

University of Sunderland

System Center Service Management

Analyst User Guide



**University of
Sunderland**

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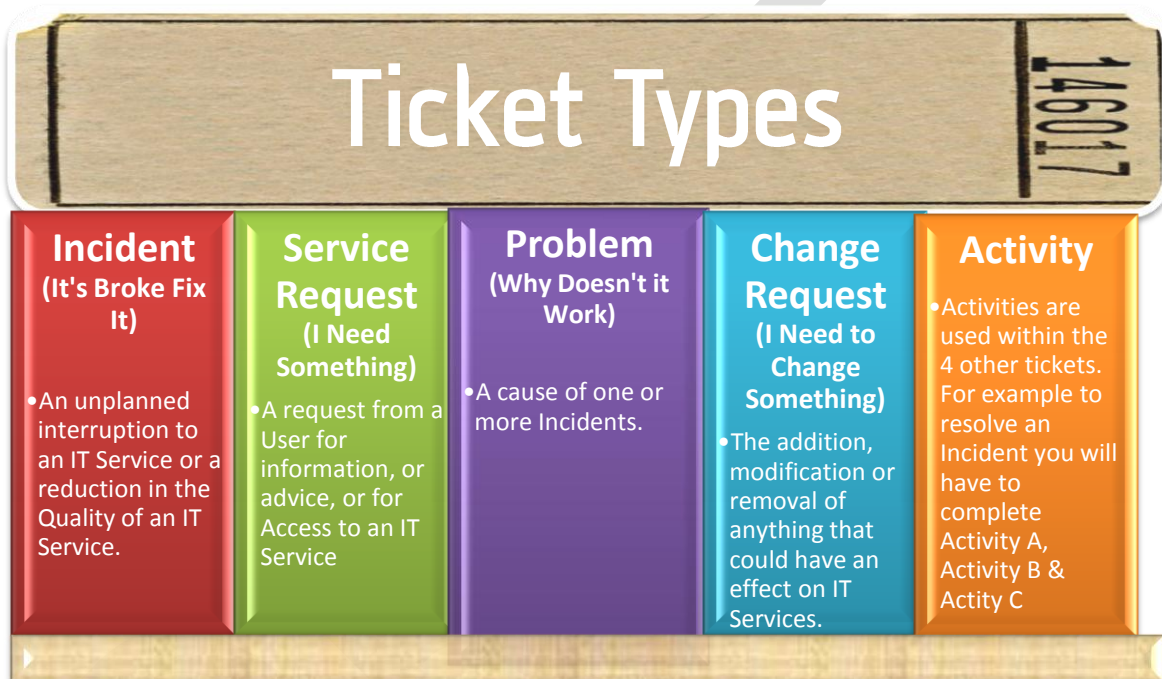
Introduction

This guide is designed for all users of System Center Service Manager (SCSM). It provides an overview of how to create and manage tickets within the SCSM system.

The first six chapters give an overview of navigation of the tool and the management of tickets.

The system will allow you to create and manage four types of ticket. They are incidents, service requests, problems and change requests. There is also an activity ticket, these tickets are used as other activities to help you complete the four main ticket types.

Ticket Types

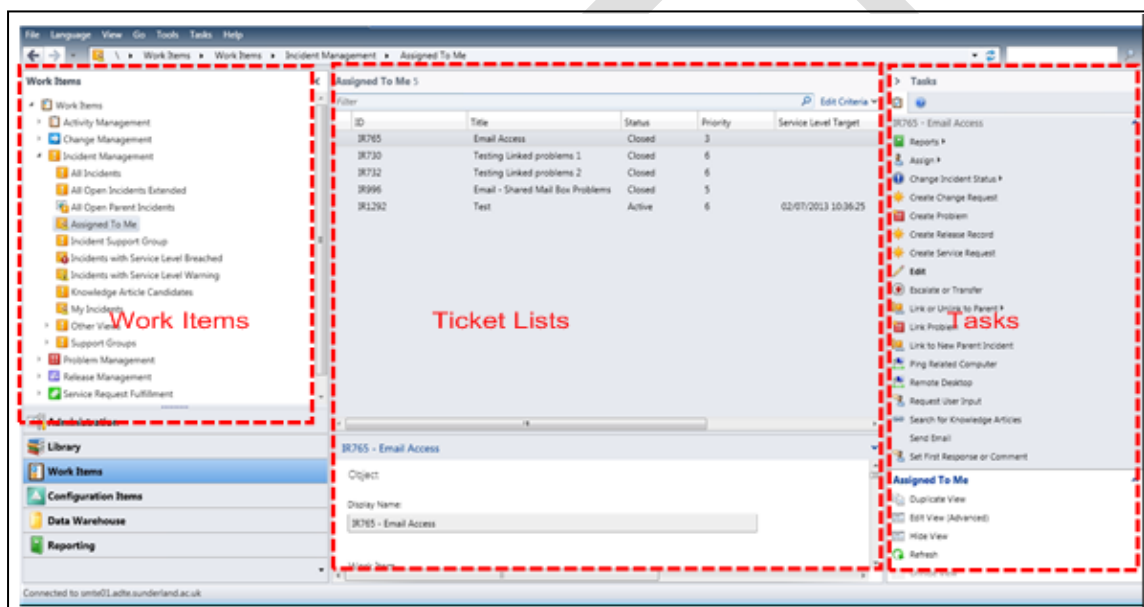


1. Login & Navigation

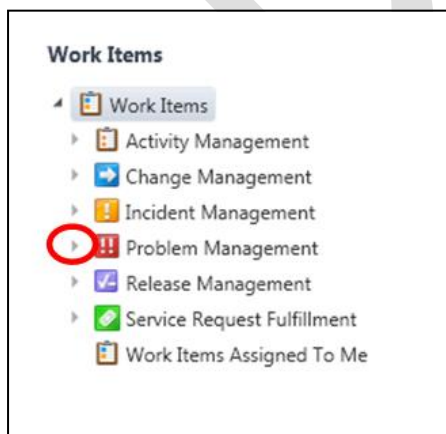


Click on the Service Center icon and select the **Work Items** area on the bottom right of the screen.

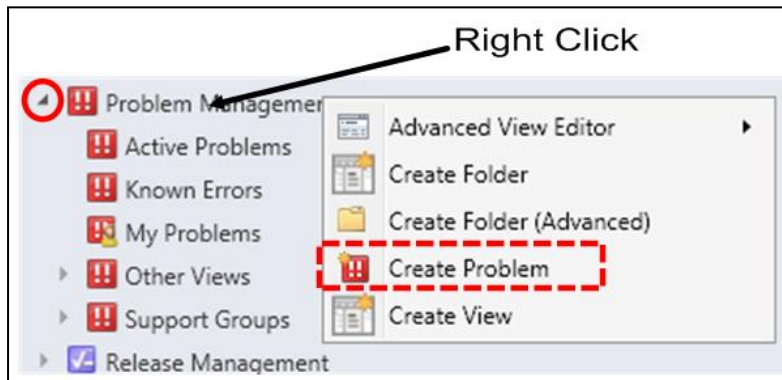
The Work Items screen is split into 3 areas reading left to right. Work Items, Ticket lists, and Tasks.



Work items

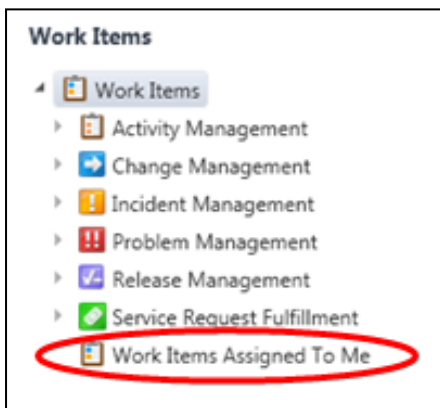


You can expand and contract the work items by clicking the arrow to the left area. Clicking it once will expand the area. Clicking it again will contract the area.



Clicking on an area will display the lists for your selection. For example clicking on **Active Problems** from the **Problem Management** area will show the list of all active problems. Clicking on **Problems Assigned To Me** will show problems which are assigned to yourself.

Right Clicking in an area will give further options including a **Create** option. Clicking on this option will create a ticket of that type.



Select the **Work Items Assigned To Me** will show a list of all tickets and manual activities assigned to you. Please note review activities do not appear in this list.

Ticket Lists

Your list will represent the list you have chosen from the Work items. For example clicking on **Active Problems** from the **Problem Management** area will show the list of all active problems. Clicking on **My Problems** will show problems tickets which are assigned to yourself.

A summary of the currently selected ticket is displayed in the preview bar below the lists of tickets.

Double clicking on a ticket will open that ticket.

Assigned To Me 4

Filter Edit Criteria

ID	Title	Status	Priority	Service Level Target	Support Group	Last
IR730	Testing Linked problems 1	Closed	6		ITS Process and Projects	06/1
IR732	Testing Linked problems 2	Closed	6		ITS Process and Projects	06/1
IR765	Email Access	Closed	3		ITS Process and Projects	06/1
IR996	Email - Shared Mail Box Problems	Resolved	5		ITS Customer Services	06/1

IR730 - Testing Linked problems 1

Object

Display Name:

IR730 - Testing Linked problems 1

Work Item

Tasks

> Tasks

IR1138 - 123 test

- Reports
- Assign
- Change Incident Status
- Create Change Request
- Create Problem
- Create Release Record
- Create Service Request
- Edit
- Escalate or Transfer
- Link or Unlink to Parent
- Link Problem
- Link to New Parent Incident
- Ping Related Computer
- Remote Desktop
- Request User Input
- Search for Knowledge Articles
- Send Email
- Set First Response or Comment

All Incidents

- Delete View
- Edit View
- Edit View (Advanced)
- Refresh

Incident Management

- Advanced View Editor
- Create Folder
- Create Folder (Advanced)
- Create Incident
- Create Incident from Template
- Create View

Work Items

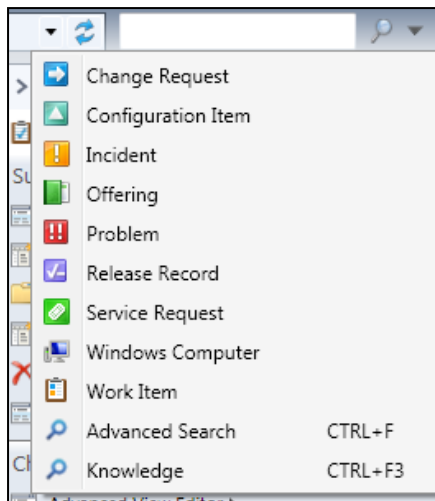
- Create Folder (Advanced)

What tasks you will see in the tasks area will depend on what area you have selected in the **Work Items**.

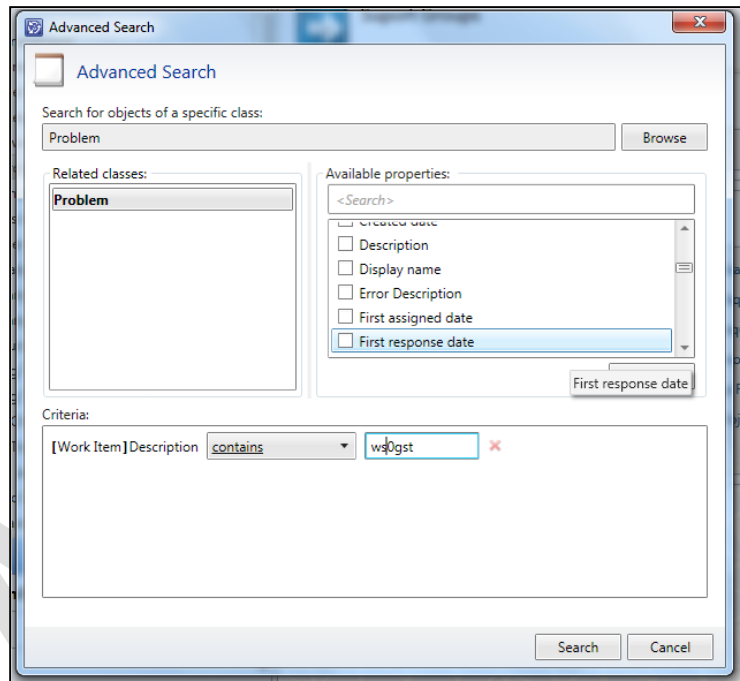
Use the refresh button on the tasks bar to update information on Ticket Lists and tickets.

You can Expand or Collapse the Task Bar by clicking on the arrows at the top right of the task areas.

Searching Tickets with Advanced Search (Ctrl+F)



Use the Advanced Search to search for tickets. Press **Ctrl+F** for the shortcut, or select **Advanced Search** from the Search options



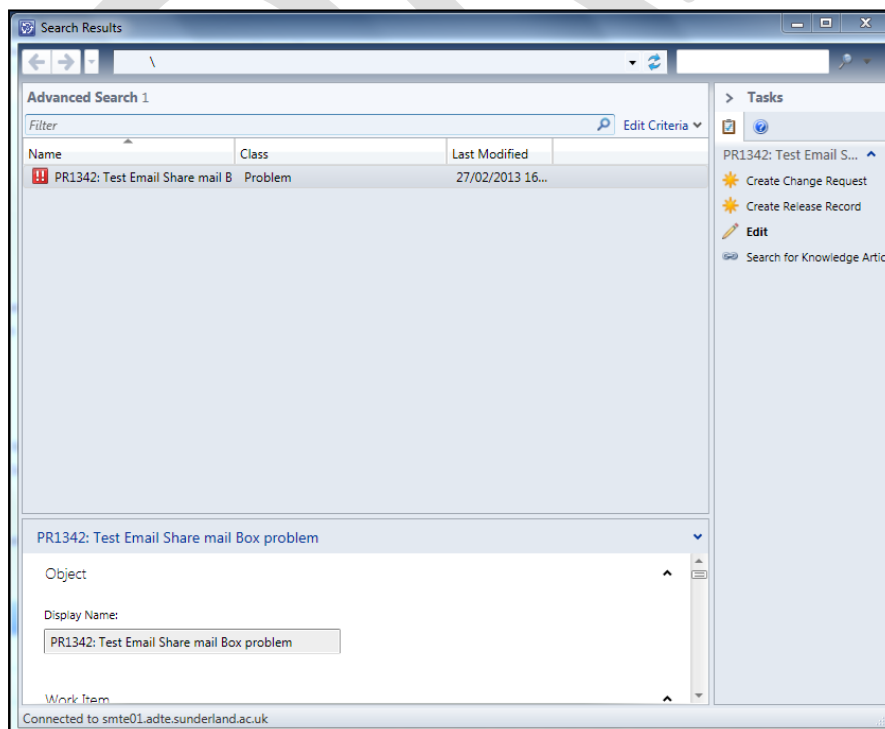
Click on the **Browse** button and select the ticket type you wish to search for.

Select the field you wish to search for and click **Add**.

Add the search criteria in the field in the **Criteria** area.

You can add as many search criteria as you wish. Click **Search** when complete.

A Search Results box will display all the results of the search criteria you have given. Double click on the ticket to open the ticket.



Filtering Lists

Above all lists there is a filter area. Type what you want to search for in the filter box and it will filter to the tickets to that match the criteria.

All Incidents 25 of 205				
email x				
ID	Title	Assigned To	Status	Priority
IR1767	Email shared account inbox probl...	Garry Storer	Closed	5
IR612	This is an incident from an email		Active	2
IR765	Email Access	Garry Storer	Closed	3
IR1080	Testing email incidents		Active	2
IR1441	testing Request User Input & Sen...	Clare O-Sullivan	Active	4
IR449	Ticket From Email	ADTE.waterstons4	Active	5

To edit your filter criteria click on the **Edit Criteria** button. Click **Add Criteria** to add some filter criteria.

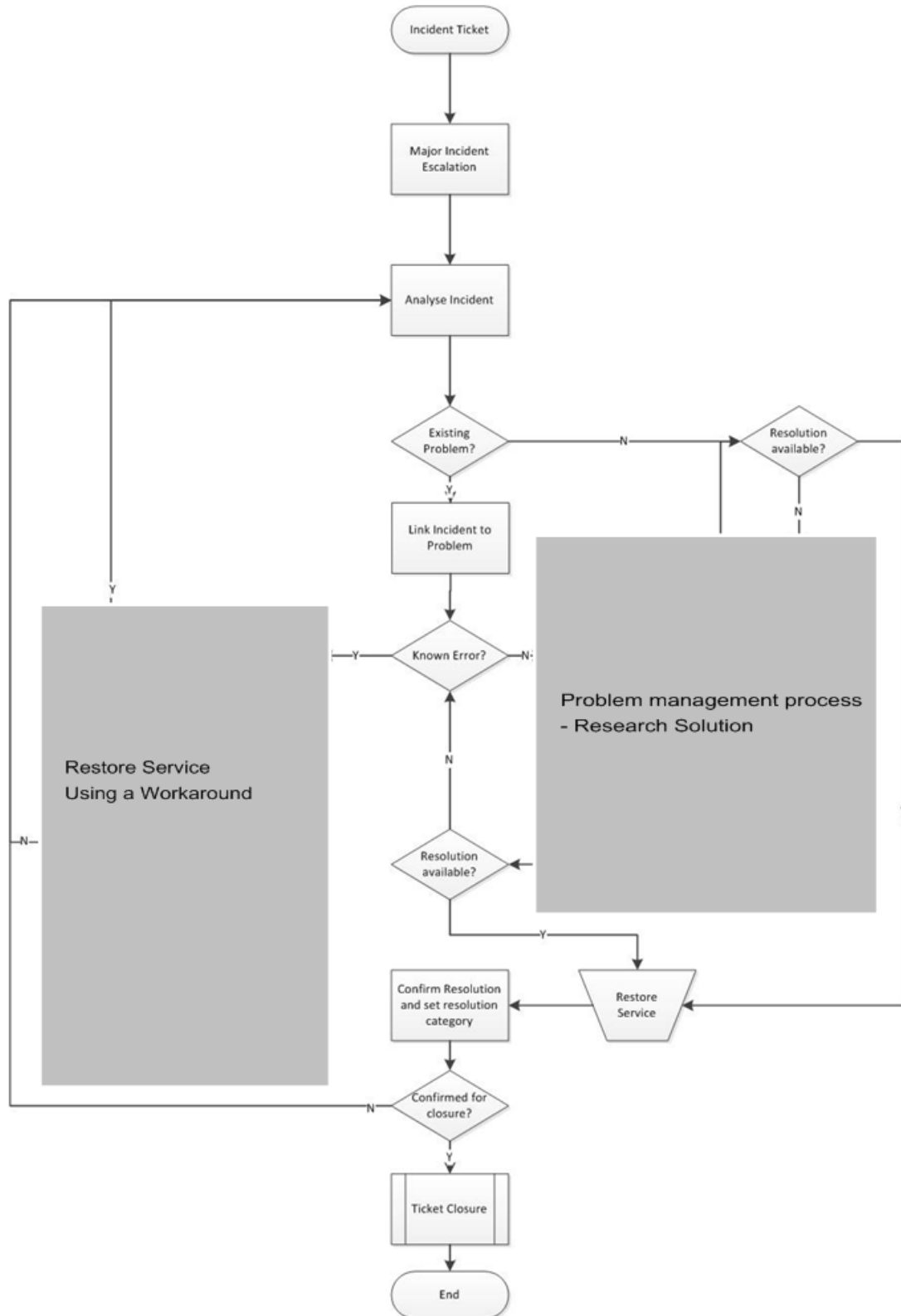
All Incidents 25 of 205				
email x Edit Criteria ^				
Add Criteria v				

Select the field you want from the list and add the filter criteria text in the box provided. Click on the cross on the right of the criteria to delete the criteria.

All Incidents 8 of 205					
email x Edit Criteria ^					
and Support Group contains customer x					
and Status contains active x					
Add Criteria v x Clear All					
ID	Title	Assigned To	Status	Priority	Target
IR1774	Matthew Creating Email Incident	ADTE.waterstons4	Active	5	
IR1943	Garry Logging a ticket via email		Active	5	
IR1720	emails testing again	smtrain02	Active	1	
IR1327	this is an email incident		Active	5	
IR2275	Testing emails		Active	5	
IR1840	This is my email issue	smtrain02	Active	5	
IR1945	Garry Testing ticket logging via e...		Active	5	
IR2255	Email Sharing problems - Inbox c...	Garry Storer	Active	3	

2. Incident

Incident Process



Viewing and Opening Incidents.



Expand the **Incident Management** area from the Work Items and select the area you wish to view. Clicking on an area will display the lists for your selection. For example clicking on **All Incidents** will show all incidents. Clicking on **Assigned to Me** will show incidents which are assigned to yourself.

A summary of the currently selected ticket is displayed in the preview bar below the lists of tickets.

Double clicking on a ticket will open that ticket.

A screenshot of the 'Assigned To Me' incident list. The list has a filter bar and a table with columns: ID, Title, Status, Priority, and Service Level Target. The table contains six rows of data. The row for ID 'IR1292' is highlighted with a red dashed box. Below the table is a preview bar for the selected ticket, also highlighted with a red dashed box. The preview bar shows the ticket title 'IR1292 - Test', the object 'Object', the display name 'IR1292 - Test', and the work item 'Work Item'.

ID	Title	Status	Priority	Service Level Target
IR765	Email Access	Closed	3	
IR730	Testing Linked problems 1	Closed	6	
IR732	Testing Linked problems 2	Closed	6	
IR996	Email - Shared Mail Box Problems	Closed	5	
IR1292	Test	Active	6	02/07/2013 10:36:25

IR1292 - Test

Object

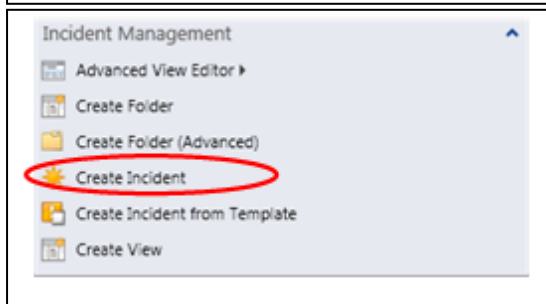
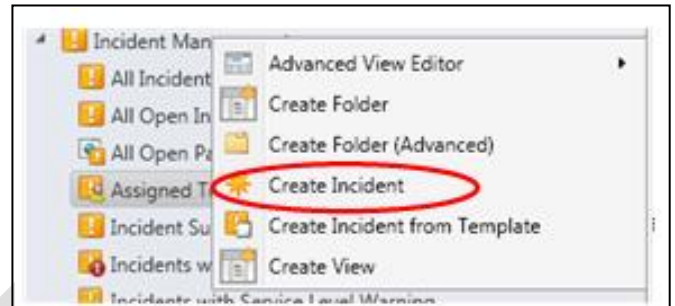
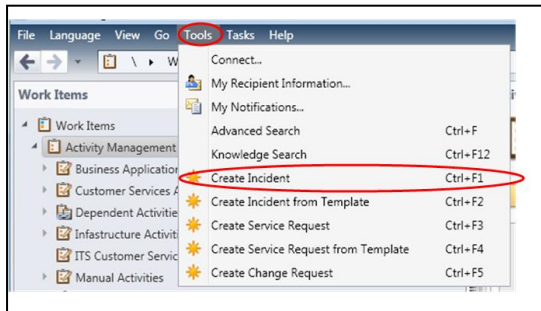
Display Name:

IR1292 - Test

Work Item

Creating a New Incident Ticket(Ctrl+F1)

You can create an incident ticket in various ways. Press **Ctrl+F1** for the shortcut, select **Create Incident** from the **Tools** menu, right click from Incident Management and select **Create incident**, or select **Create Incident** from the Task Area



Incident Ticket Information Capture Fields

A table explaining the ticket information capture fields is listed below. These fields can be found in the **General** Tab of an incident ticket. After you have captured the information you can **save** the information by clicking **OK** or **Apply** at the bottom of the screen. Clicking **OK** will save then close the ticket whilst **Apply** will save the information and keep the ticket open. Clicking **Cancel** will not save any of the information you have captured or changed.

IR996 Affected user: Garry Storer Created on: 05/02/2013 14:
Resolved Contact info: 077999923232 Target End Da:
Parent incident First response

General Activities Related Items Resolution Service Level History

Incident Information

Affected user: Alternate contact method:
☐ Garry Storer (ws0) ☐
☐ Is Major Incident

Title:


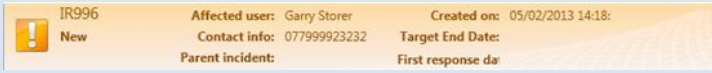
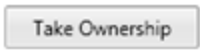
Description:

Location:

Service Area: Source:

Impact: Urgency: Priority:

Support group: Assigned to:

Information	Field	Description
General Information	Affected User	<p>Type in the Name or User name of the affected user. Use the check names & search directory icons to the right of the field to help with the search. Double click on the name to open the User Details information. Please refer to 7. User Details. The users detail will be displayed at the top of the ticket including contact info.</p>  
	Alternative contact method	Use this field to give an alternative contact method for the user.
	Title	The title of the Incident must be in this field
	Is Major Incident	If the incident is a major incident tick this box. Continue to raise the ticket and inform one of ITS Management that you think the ticket is a major incident.
	Description	This field is a description of the incident. Please capture as much information as you can, as this will assist the resolver of the incident.
	Location	Select the Location of the incident from the drop down list.
Service Area	Service Area	Pick the correct Service Area for the incident from the drop down list. If in doubt use the higher level.
Source	Source	Pick the correct Source of the ticket from the drop down list.
Priority	Impact	Pick the correct Impact from the drop down list. Please refer to Appendix 1 – Priority Matrix .
	Urgency	Pick the correct Urgency from the drop down list. Please refer to Appendix 1 – Priority Matrix .
	Priority	This will display the priority of the ticket as determined by the Impact & Urgency. When talking to the customer please refer to the resolution times not the priority number. Please refer to Appendix 2 –Priority Information . Click on the Question Mark symbol for further information about priorities.
Assignment	Support Group	Set the resolver group to the support group you belong to .If the ticket cannot be resolved by yourself set the appropriate Support Group into this field. Please contact the Support Group before you pass the ticket to the support group.
	Assigned To	<p>This field will show the name of the ticket owner. If you are taking Ownership of the ticket press the Take Ownership button.</p> 

Transfer the ticket to another support group

Support group: Assigned to: smtrain05 (smtra)

FAM - Faculty Arts Media
FAS - Faculty of Applied Science
FBL - Faculty of Business and La
FES - Faculty of Education and S
ITSBA - ITS Business Application
ITSCS - ITS Customer Services
ITSINF - ITS Infrastructure
ITSPP - ITS Process and Projects
LTVLE - Learning Technology - V
LTWE - Learning Technology W
SLSE - SLS Executive
ULS - University Library Services
ULST - University Library Service

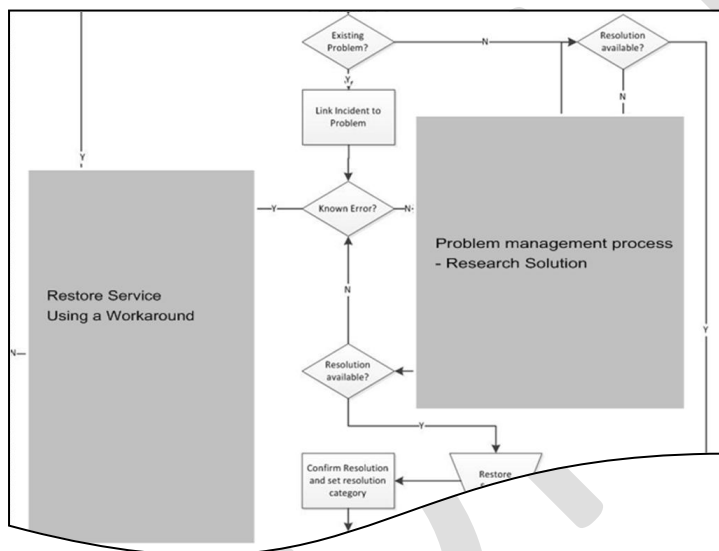
Identified name Last modified Status

☐ Private

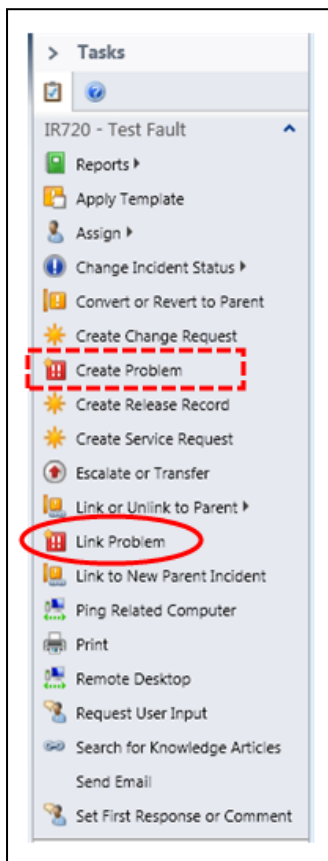
To transfer the incident to another Support Group, select the **Support group** from the drop down list and click the **Take Ownership** button. Click **OK** or **Apply** to transfer the ticket to the other team. Click **Cancel** if you do not want to transfer the ticket to another group.

Please remember to contact the support group about the transfer in advance of running this process.

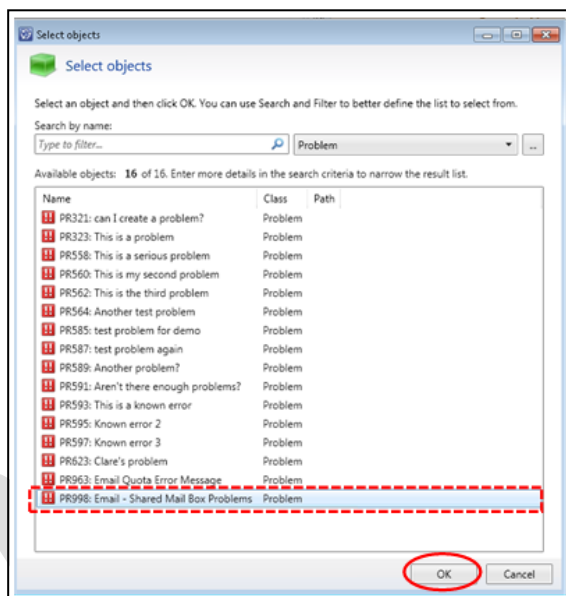
Linking Problems



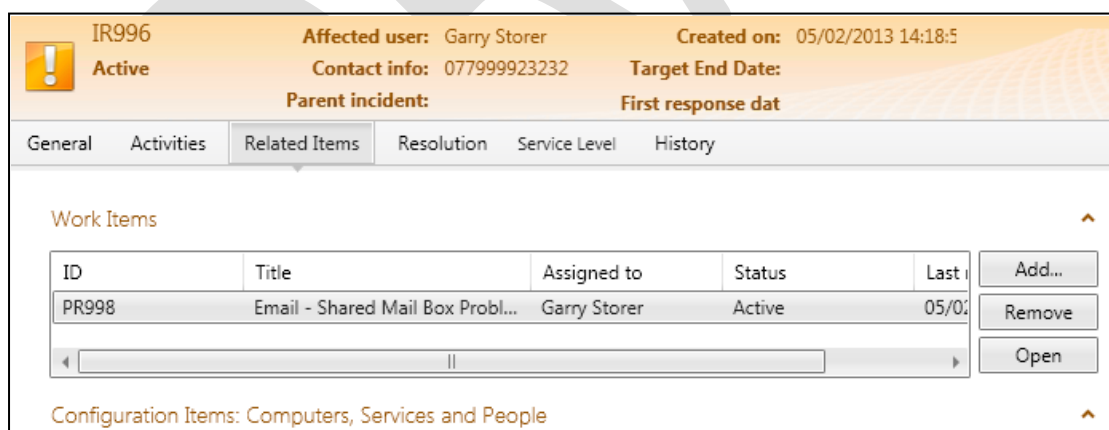
An essential part of resolving incidents is to link or create a problem ticket. The solutions and workaround of the incidents will be in the problem tickets. Information about problem tickets can be found at [5. Problem](#).



To link the Incident to a problem click on the **Link Problem** icon on the **Tasks bar** of the Incident. Select the problem from the list and click **OK**. Click **Cancel** if there is no problem to link the incident to. If you wish to create a problem for the incident ticket click on the **Create Problem** from the Incident Task Bar. Information about problem tickets can be found at [5. Problem](#).

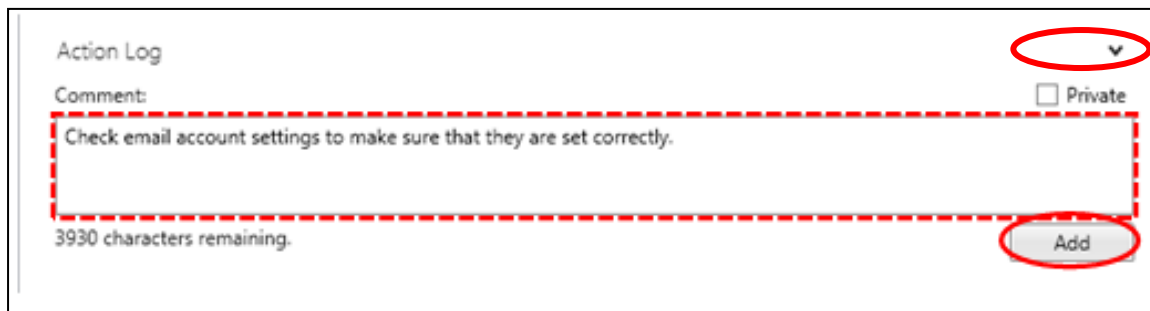


You can see, manage and open the linked problems via the **Related Items** tab on the Incident ticket. They are listed in **Work Items** area. You may have to refresh the ticket to see the related item. You can highlight a problem and click **Remove** to unlink the problem, or click **Open** to open the problem ticket. You can also link a problem on this screen by clicking the **Add** button.



Adding Actions

The Action Log is an area where you can add actions or information about the ticket. The customer can also see these actions using the Portal. Actions are found at the bottom of the **General** tab of the Incident ticket. It will record any transfers and assignments of the ticket as well as Customer information & feedback. If you wish to add information or actions, click in the **Comment** field of the **Action Log**, and type the required information. You have 4000 characters to use per Comment. Click the **Private** tick box if you do not wish the customer to see the action. Click on the **Add** button to add the comment.



The screenshot shows the 'Action Log' section of a ticket interface. It features a 'Comment' text area with a red dashed border containing the text 'Check email account settings to make sure that they are set correctly.' Below the text area, it says '3930 characters remaining.' To the right of the text area is a 'Private' checkbox. At the bottom right of the form is an 'Add' button. A red circle highlights a dropdown arrow in the top right corner of the form area.

The history of the Log is displayed underneath this field. You can expand or contract the Log entry by clicking on the expand / collapse icons to the left of the entry. There is also an **Expand All / Collapse All** icon to the top right of the entries.

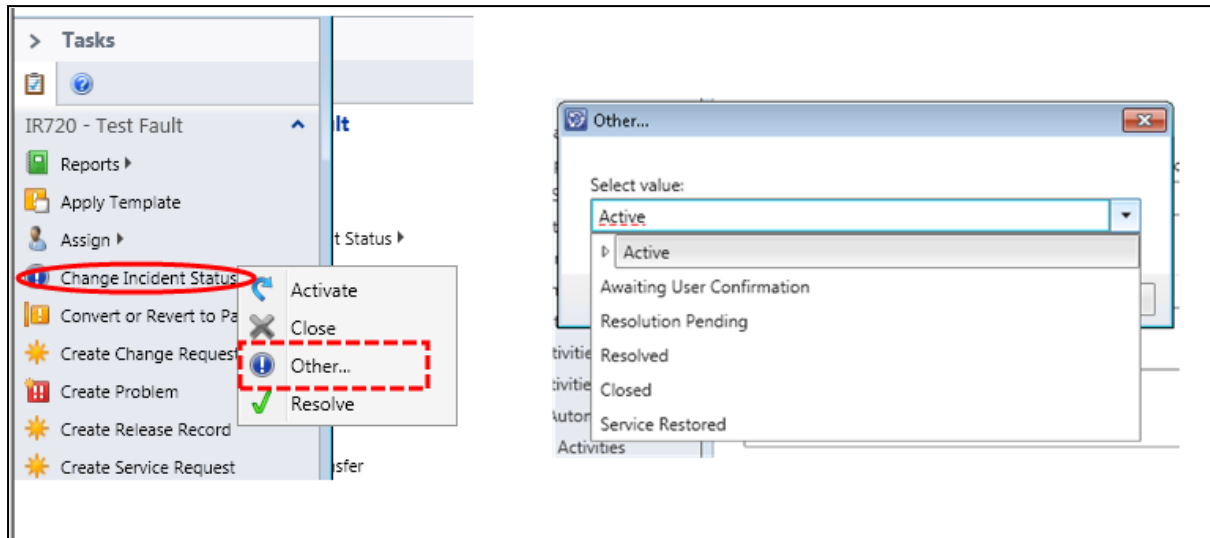


The screenshot shows the history of actions for the ticket. A 'Collapse all' button is circled in red at the top right. The table below lists various actions, with a red dashed box highlighting the first four entries.

Log entry	Private	Created by	Date time
Record Opened Email - Shared Mail Box Problems		Garry Storer	05/02/2013 1
Incident dispatched to ITS Infrastructure Infrusture will deal with request as they spotted an error with the Active Direcrory account		Garry Storer	05/02/2013 1
Record Assigned Assigned by Garry Storer to Garry Storer		Garry Storer	05/02/2013 1
Analyst Comment Check email account settings to make sure that they are set correctly.	<input type="checkbox"/>	Garry Storer	05/02/2013 1

Change Incident Status

To change the incident status of the ticket click on the **Change Incident Status** from the Incident Task Bar. From the submenu click on the one you require. Click **Other** to give the full list of choices via the drop list. Select the one you require and click **OK**. There is a table below which gives a description of all the statuses.



Incident Status	Description
Active	The ticket is currently active and awaiting resolution.
Service Restored	Use this status to indicate that the ticket is resolved and awaiting the affected users confirmation of closure of ticket. The ticket will change to Resolved if the affected user does not respond within 10 working days.
Awaiting User Confirmation	You are awaiting information from the customer. The ticket goes into this status after you have changed the status to Service Restored and are awaiting confirmation from the customer via the Portal.
Resolved	The ticket will change to this status after the user has confirmed that the ticket is resolved.

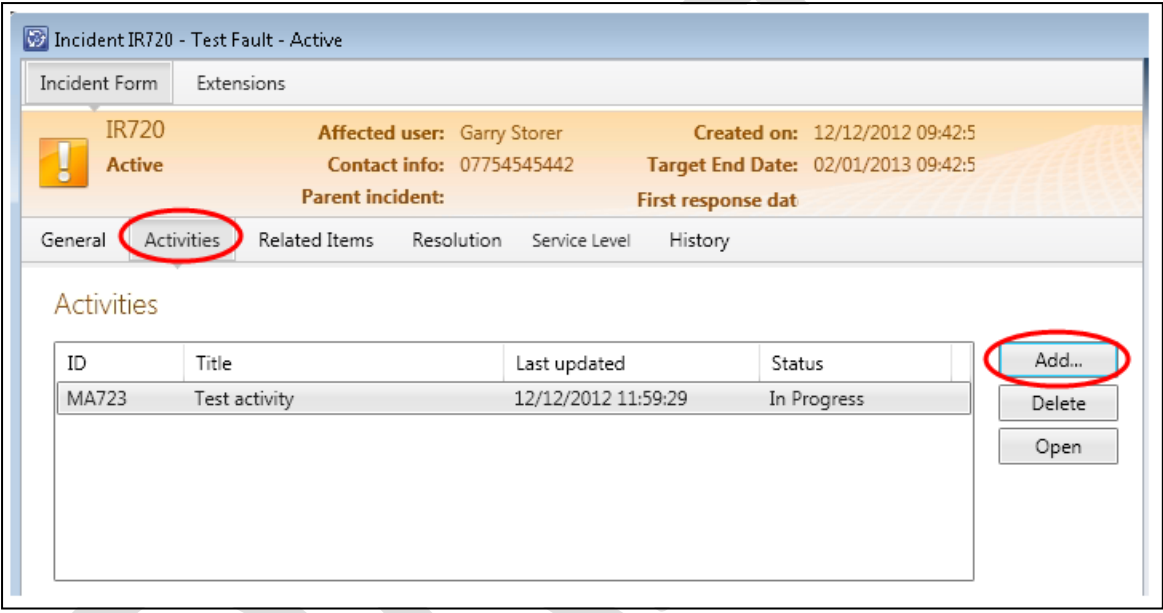
Creating Activities

If another resolver or resolver group need to complete some Activities to allow you to resolve the ticket, you can assign activities to them. You must contact the support group to notify them you are requesting activities from them.

To add activities to your incident click on the **Activities** Tab and click on the **Add** button. Click **Manual Activity** then Default **Manual Activity**. Follow the steps as described in [6. Activities](#) to create the activity.

The status of the activity can easily be seen from the Status field in the list. To open the Activity to check on the status click the activity you require and click on the **Open** button.

To delete an Activity from your list, click on the activity and click on **Delete**.



The screenshot shows the 'Incident IR720 - Test Fault - Active' interface. The 'Activities' tab is selected and circled. Below the tab, there is a table of activities. The table has columns for ID, Title, Last updated, and Status. One activity is listed: MA723, Test activity, 12/12/2012 11:59:29, In Progress. To the right of the table, there are three buttons: 'Add...' (circled), 'Delete', and 'Open'.

ID	Title	Last updated	Status
MA723	Test activity	12/12/2012 11:59:29	In Progress

Attaching & Viewing Files

Attached Files

Files cannot exceed 2048 KB

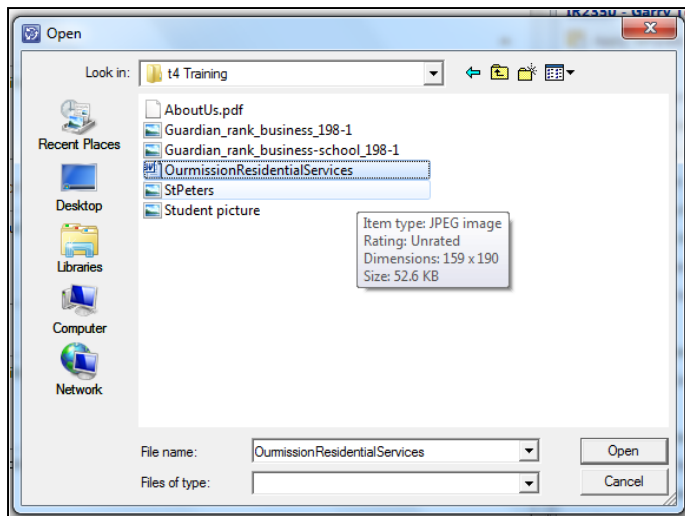
File name	Attached by	Size in bytes
-----------	-------------	---------------

Add...

Remove

Save

To add a file attachment to an Incident, click on the **Related Items** Tab. Goto the **Attach Files** section to the bottom of the screen and click on **Add...**



Select the files you wish to attach and click the Open button to attach the files to the ticket.

To view the attached files double click on the file you wish to view. Click **Remove** to remove the file from the ticket.

Attached Files

Files cannot exceed 2048 KB

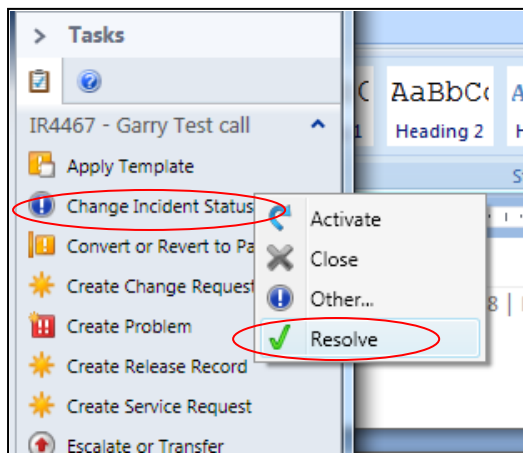
File name	Attached by	Size in bytes
OurmissionResidentialService...	smtrain05	27648
StPeters.jpg	smtrain05	53938

Add...

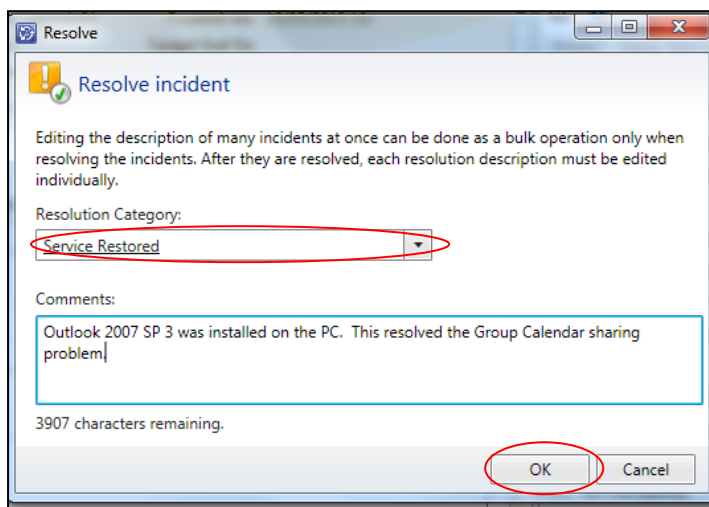
Remove

Save

Resolution of Incidents



To resolve tickets click on **Change Incident Status** from the task bar. Select the **Resolution category** you require from the drop down list, and add text on how the Incident was resolved in the field below. There is a table below which gives a description of all the statuses.



To save the status click **OK** from the Resolve screen and **Apply** or **OK** at the bottom of the incident ticket.

Incident Status	Description
Cancelled	Use the status to cancel the ticket, if it was created by error.
Service Restored	Use this status to indicate that the ticket is resolved and awaiting the affected users confirmation of closure of ticket. The ticket will change to Resolved if the affected user does not respond within 10 working days.
Auto Resolved by Problem	The ticket will change to this status if it has been resolved from a linked problem.

Incident History

To view the history of the incident, click on the **History** tab.

You will see a full list of the history of the ticket, in summary mode stating the date, time and the users. You can expand / collapse each status by clicking on the arrow to the left.



IR765 Affected user: Adil Khan Created on: 24/01/2013 10:32
Resolved Contact info: 0771234567 Target End Date:
Parent incident: First response date:

General Activities Related Items Resolution Service Level **History**

▼ 24/01/2013 10:54:11 ADTE\ws0gst
▼ 24/01/2013 11:02:04 ADTE\ws0gst
▼ 24/01/2013 11:02:56 ADTE\ws0gst
^ 24/01/2013 11:28:12 ADTE\ws0gst

Property changes:

Property	Old Value	New Value
Status	Active	Resolved
Resolved date		24/01/2013 11:19:18
Support group	ITS Infrastructure	ITS Customer Services
Resolution category		Service Restored
Resolution description		User given access to the shared email accounts bs0sug bs0ccm

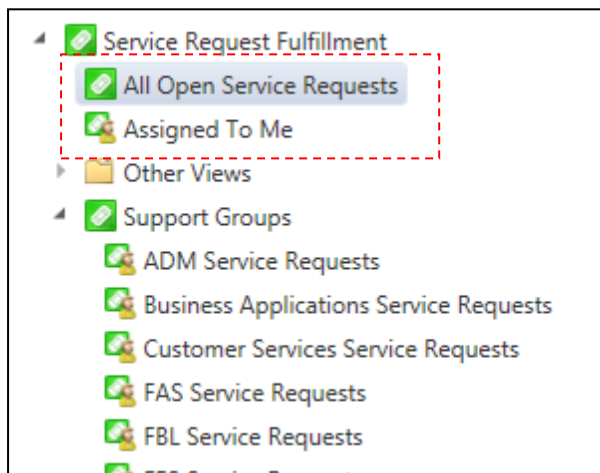
Relationship changes:

Add/Remove	Relationship class	Item
Add	Has Analyst Comment	fd844dee-4212-4342-b867-86ddc6d194d4
Add	Resolved By User	Garry Storer

OK Cancel Apply

3. Service Request

Viewing and Opening Service Requests.



Expand the **Service Desk Fulfilment** area from the Work Items and select the area you wish to view. Clicking on an area will display the lists for your selection. For example clicking on **All Open Service Requests** will show all open Service Requests. Clicking on **Assigned To Me** will show Service Requests which are assigned to yourself.

A summary of the currently selected ticket is displayed in the preview bar below the lists of tickets.

Double clicking on a ticket will open that ticket.

A screenshot of a software interface titled 'Assigned To Me 4'. It features a table of tickets with columns for ID, Title, Owner, Status, and Priority. The first row is highlighted with a red dashed box. Below the table is a preview section for the selected ticket, showing the object name and a display name field.

ID	Title	Owner	Status	Priority
✓ SR1848	This is to add activities	smtrain02	Closed	Individual
! SR1842	This is a service request	smtrain02	Failed	Team
SR2282	Reset Password	smtrain02	Submitted	Individual
✓ SR1883	Default request	smtrain02	Closed	Team

SR1848 : This is to add activities

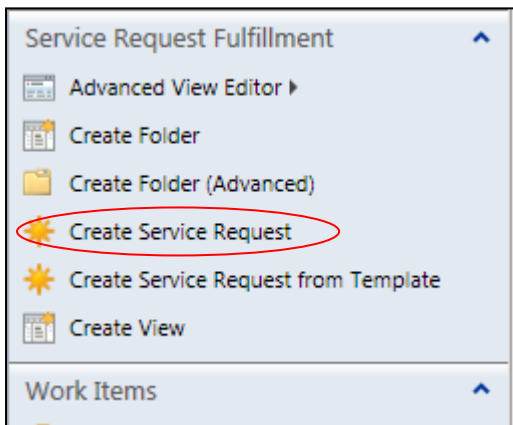
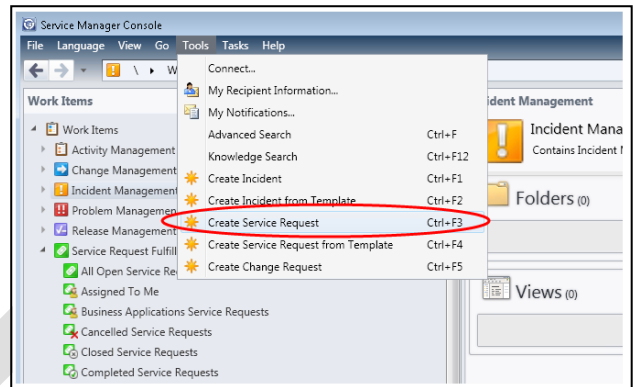
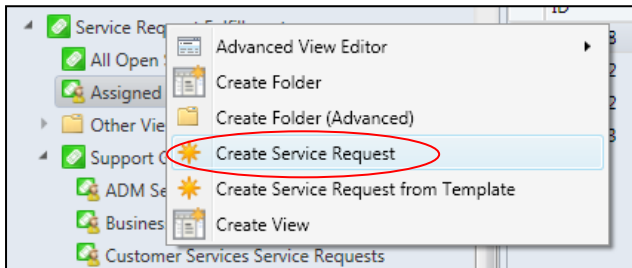
Object

Display Name:

SR1848 : This is to add activities

Creating a New Service Request Ticket (Ctrl+F3)

You can create a Service Request ticket in various ways. Press **Ctrl+F3** for the shortcut, select **Create Service Request** from the **Tools** menu, right click from Service Request Fulfillment and select **Create Service Request**, or select **Create Service Request** from the Task Area.



Select the Template you wish to choose and click **OK**, select ***** for a blank service request form, or choose from one of the templates if you require.

Service Request Ticket Information Capture Fields

A table explaining the ticket information capture fields is listed below. These fields can be found in the **General** Tab of a Service Request ticket. After you have captured the information you can **save** the information by clicking **OK** or **Apply** at the bottom of the screen. Clicking **OK** will save then close the ticket whilst **Apply** will save the information and keep the ticket open. Clicking **Cancel** will not save any of the information you have captured or changed.

SR4046 : Laptop Wireless Request

Service Request Form Extensions

SR4046 Activity stage: Created On: 4/30/2013 4:47:08 PM
Request Offering: Generic Request Created by: smtrain01

General Activities Results Related Items Service Level History

Service Request Information

Affected User: in08 (smtrain08) Alternate contact method: 02323232323

Title: Laptop Wireless Request

Description: smtrain 08 require wirless access for laptop B

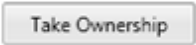
Urgency: P2 - 1 Business Day Impact: Individual Location: CCTP1 - Tech Park Unit 1 Source: Phone

Service Area: Connectivity/Mobile Data Support Group: ICS - ITS Customer Services Assigned to: smtrain01 (smtr)

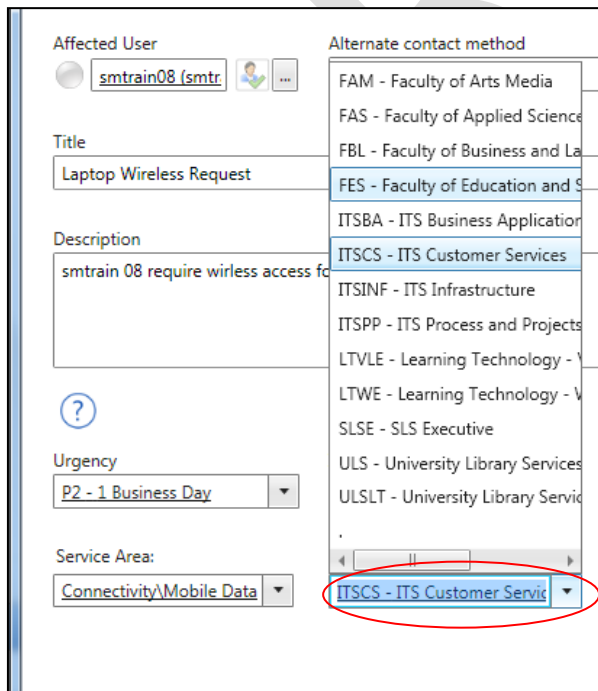
Take Ownership

OK Cancel Apply

Information	Field	Description
General Information	Affected User	Type in the Name or User name of the affected user. Use the check names & search directory icons to the right of the field to help with the search. Double click on the name to open the User Details information. Please refer to 7. User Details .
	Alternative contact method	Use this field to give an alternative contact method for the user.

	Title	The title of the Service Request must be in this field
	Description	This field is a description of the Service Request. Please capture as much information as you can, as this will assist the resolver of the request.
	Location	Click the Location of the Service Request from the drop down list.
Priority	Urgency	Pick the correct Urgency from the drop down list
	Impact	Pick the correct Impact from the drop down list.
Source	Source	Pick the correct Source of the ticket from the drop down list.
Service Area	Service Area	Pick the correct Service Area for the incident from the drop down list. If in doubt use the higher level.
Assignment	Support Group	Set the resolver group to the support group you belong to .If the ticket cannot be resolved by yourself set the appropriate Support Group into this field. Please contact the Support Group before you pass the ticket to the support group.
	Assigned To	This field will show the name of the ticket owner. If you are taking Ownership of the ticket press the Take Ownership button. 

Transfer the ticket to another support group



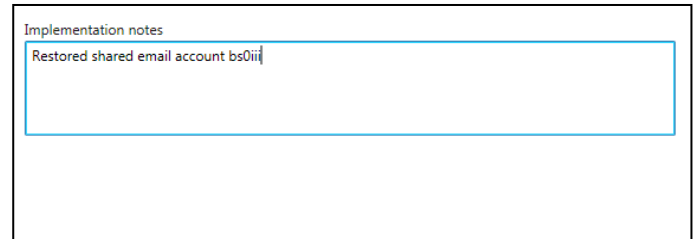
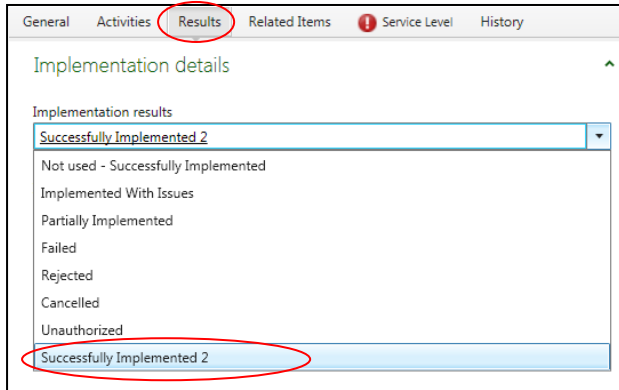
The screenshot shows a web form for creating or editing a Service Request. The 'Affected User' is 'smtrain08 (smtr)'. The 'Title' is 'Laptop Wireless Request'. The 'Description' is 'smtrain 08 require wireless access for'. The 'Urgency' is 'P2 - 1 Business Day'. The 'Service Area' is 'Connectivity/Mobile Data'. The 'Support Group' dropdown is open, showing a list of support groups. 'ITSCS - ITS Customer Services' is highlighted and circled in red.

To transfer the Service Request to another Support Group, select the **Support group** from the drop down list and click the **Take Ownership** button. Click **OK** or **Apply** to transfer the ticket to the other team. Click **Cancel** if you do not want to transfer the ticket to another group.

Please remember to contact the support group about the transfer in advance of running this process.

Changing the Status & Resolving the ticket

To Change the status or resolve tickets click on the **Results** tab. Select the **Implementation results** you require from the drop down list, and add text on how you implemented the request in the comments box. There is a table below which gives a description of all the statuses.



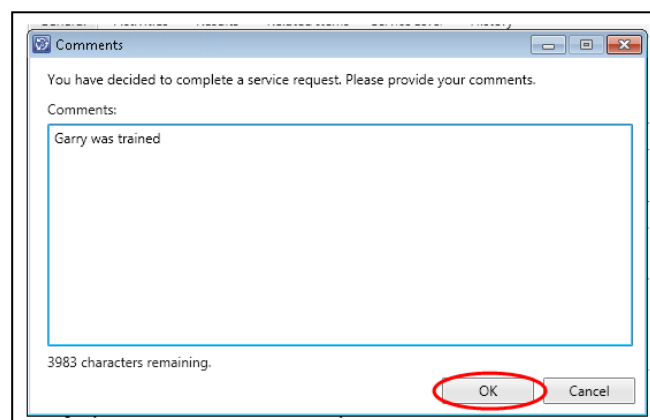
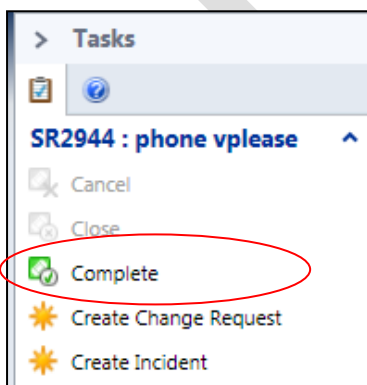
To save the status click on **Apply** or **OK** at the bottom of the ticket.

Service Desk Status	Description
Successfully Implemented	The service request was successfully completed.
Cancelled	You have cancelled the request for a reason.
Unauthorized	The affected user has no authorization for the request.
Failed	The Service Request implementation failed.

Completing the ticket

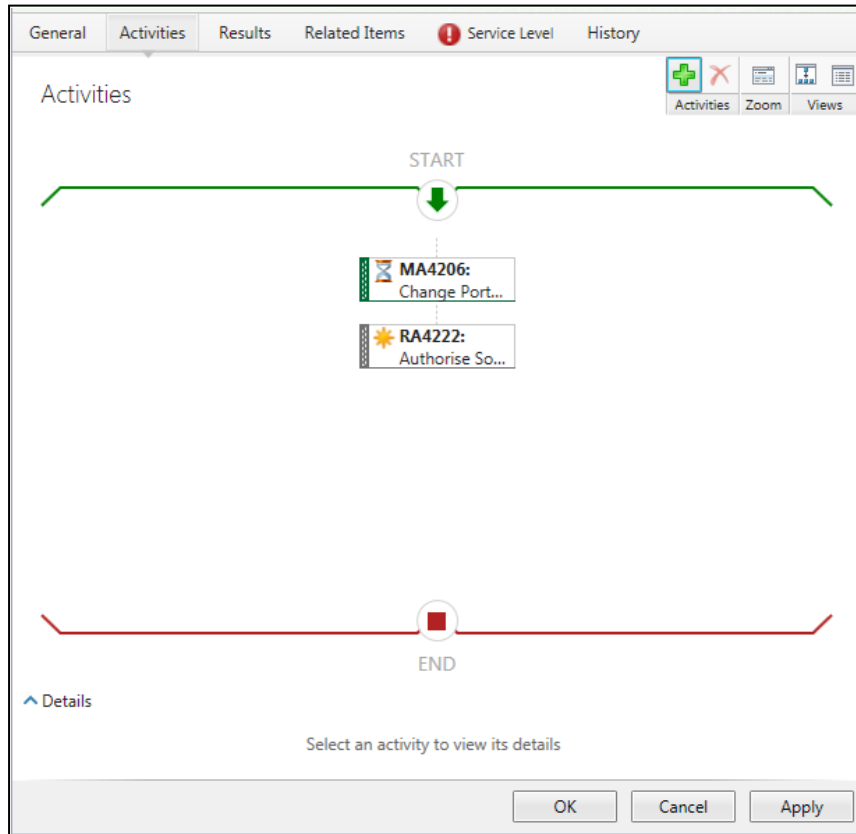
You must complete the ticket. This will send the User acceptance email and the customer will be able to close the ticket via the portal.

Click the **Complete** button from the task bar. Add a comment about the completing via the Comments box and click **OK**



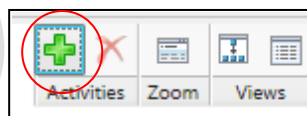
Creating Activities

If another resolver or resolver group need to complete some Activities to allow you to resolve the ticket, you can assign activities to them. You must contact the support group notifying them you are requesting activities from them.



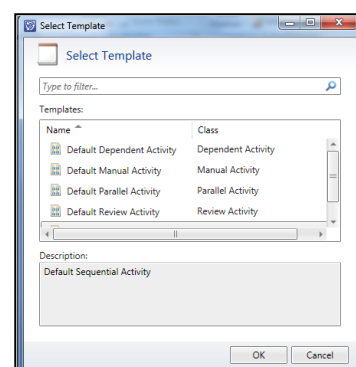
The service request activities follow a workflow. This means that the second activity can only be actioned once the first activity is complete. There are 2 types of activities in service requests. Manual Activities and Request Activities these are described in more details in [6. Activities](#).

To add an activity click on the Add symbol and choose from the template you require. Follow the steps as from [6. Activities](#) to complete the activities.

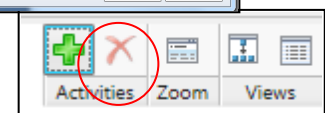


The status of the activity can easily be seen from the Status field in the list. To open the Activity to check on the status click the activity you require and click on the **Open** button.

To delete an Activity from your list, click on the activity and click on **Delete**.

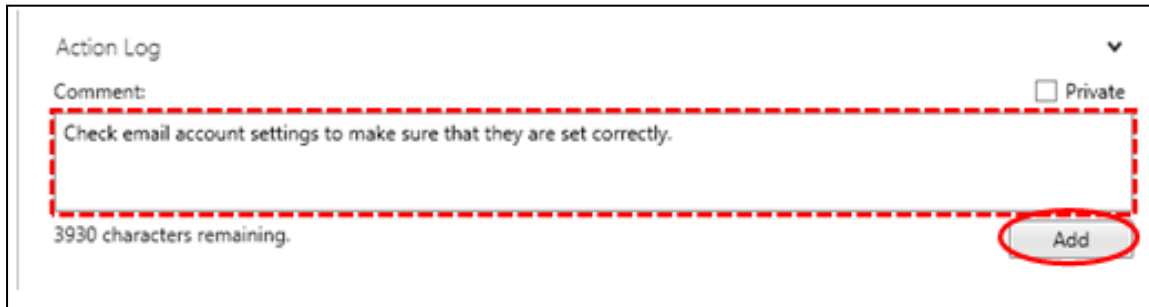


in



Adding Actions

The Action Log is an area where you can add actions or information about the ticket. It is found at the bottom of the General tab of the Service Request ticket. It will record any transfers and assignments of the ticket as well as Customer information & feedback. If you wish to add information or actions, click in the **Comment** field of the **Action Log**, and type the required information. You have 4000 characters to use per Comment. Click the **Private** tick box if you do not wish the customer to see the action. Click on the **Add** button to add the comment.



The screenshot shows the 'Action Log' section. At the top, there is a 'Comment:' label and a 'Private' checkbox. Below the label is a text input field containing the text 'Check email account settings to make sure that they are set correctly.' This field is enclosed in a red dashed rectangular box. Below the text field, it says '3930 characters remaining.' To the right of the text field is a button labeled 'Add', which is circled in red.

The history of the Log is displayed underneath this field. You can expand or contract the Log entry by clicking the Expand / Collapse icons to the left of the entry. There is also an **Expand All / Collapse All** icon to the top right of the entries.



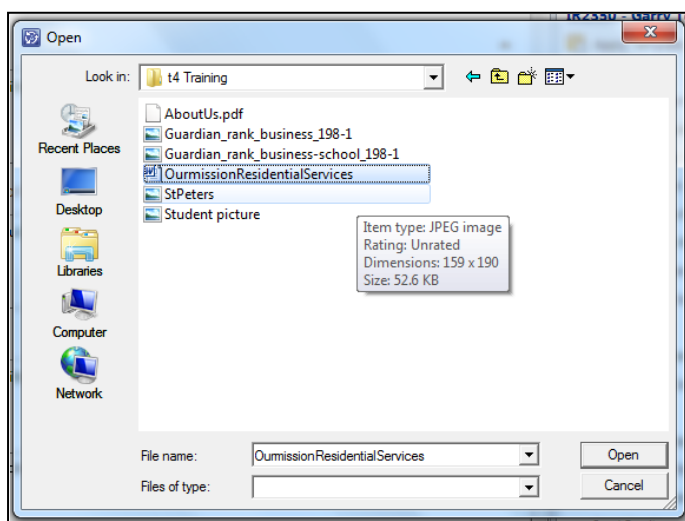
The screenshot shows the history of the Action Log. At the top right, there is a button labeled 'Collapse all' circled in red. Below this is a table with columns: 'Log entry', 'Private', 'Created by', and 'Date time'. The table contains several entries, each with an expand/collapse icon on the left. The first three entries are highlighted with a red dashed box:

Log entry	Private	Created by	Date time
Record Opened Email - Shared Mail Box Problems		Garry Storer	05/02/2013 1
Incident dispatched to ITS Infrastructure Infrastructure will deal with request as they spotted an error with the Active Directory account		Garry Storer	05/02/2013 1
Record Assigned Assigned by Garry Storer to Garry Storer		Garry Storer	05/02/2013 1
Analyst Comment Check email account settings to make sure that they are set correctly.	<input type="checkbox"/>	Garry Storer	05/02/2013 1

Attaching & Viewing Files



To add a file attachment to an Incident, click on the **Related Items** Tab. Goto the **Attach Files** section to the bottom of the screen and click on **Add...**



Select the files you wish to attach and click the Open button to attach the files to the ticket.

To view the attached files double click on the file you wish to view. Click **Remove** to remove the file from the ticket.

Service Request History

To view the history of the service request, click on the **History** tab.

You will see a full list of the history of the ticket, in summary mode stating the date, time and the users. You can expand / collapse each status by clicking on the arrow to the left.

The screenshot shows a window titled "SR2944 : SSSS" with two tabs: "Service Request Form" and "Extensions". The "Service Request Form" tab is active. It displays the following information:

- SR2944** (with a green icon)
- Activity stage:** Change Port to Vlan3
- Created On:** 4/4/2013 3:06:53 PM
- In Progress** (with a green icon)
- Request Offering:** [Generic Request](#)
- Created by:** smtrain01

Below this information is a tabbed interface with the following tabs: "General", "Activities", "Results", "Related Items", "Service Level", and "History". The "History" tab is selected and circled in red.

The "History" tab displays a list of activities with expand/collapse arrows on the left:

- ▼ 04/04/2013 15:10:17 ADTE\smtrain01
- ▼ 04/04/2013 15:10:28 ADTE\svc_SCSMWorkflow
- ▼ 04/04/2013 15:10:28 ADTE\svc_SCSMWorkflow
- ▼ 04/04/2013 15:10:48 ADTE\svc_SCSMWorkflow
- ▼ 04/04/2013 15:11:23 ADTE\svc_SCSMWorkflow
- ▼ 04/04/2013 15:12:02
- ▼ 04/04/2013 15:12:02
- ▼ 04/04/2013 15:12:02
- ▼ 04/04/2013 15:12:33
- ▲ 04/04/2013 15:12:33 (circled in red)

Below the list, there is a section titled "Relationship changes:" with a table:

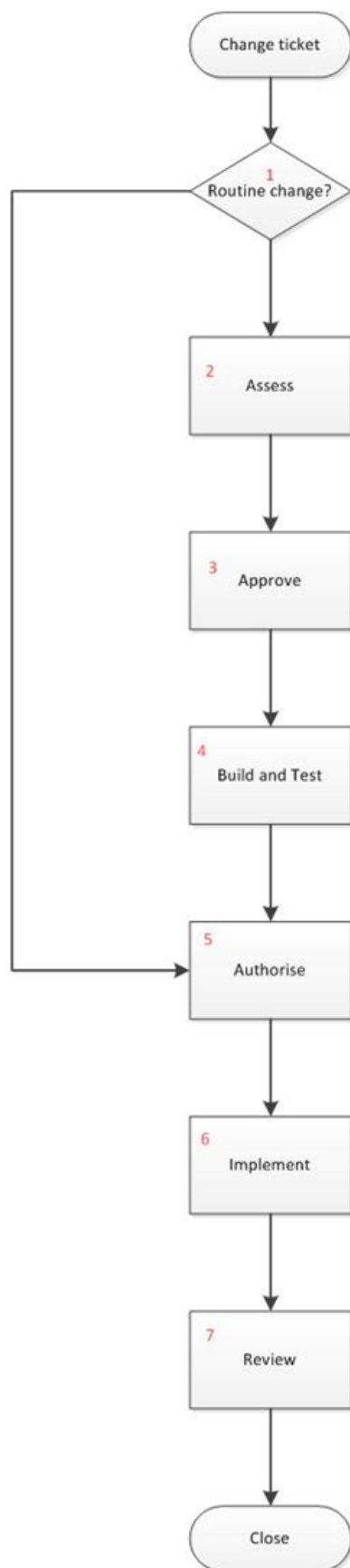
Add/Remove	Relationship class	Item
Add		SLA Group: P6 Service Request

At the bottom of the list, there is another entry:

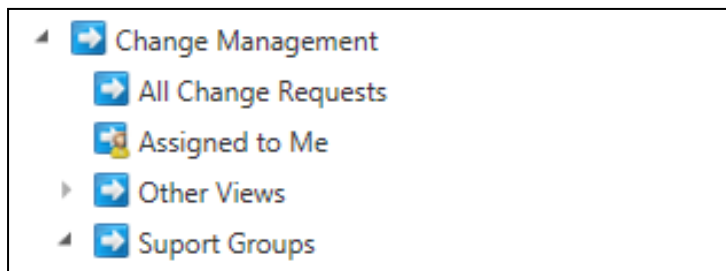
- ▼ 04/04/2013 15:12:56 ADTE\svc_SCSMWorkflow

The window has "OK", "Cancel", and "Apply" buttons at the bottom right.

4. Change Request



Viewing and Opening Change Requests.



Expand the **Change Management** area from the Work Items and select the area you wish to view. Clicking on an area will display the lists for your selection. For example clicking on **All Open Change Requests** will show all open Change Requests. Clicking on **Assigned To Me** will show Change

Requests which are assigned to yourself.

The screenshot shows a web application interface. At the top, a header bar says 'Assigned to Me 9'. Below it is a table with columns: ID, Title, Status, Category, Priority, and Impact. The table contains 9 rows of data. Below the table is a preview bar for the selected ticket, CR2962. The preview bar shows the ticket's details, including its ID, title, and status.

ID	Title	Status	Category	Priority	Impact
CR2962	Standard Change Request - patch...	In Progress		Imminent	University Wide
CR2535	Knowledge Article required - IR23...	In Progress		Anticipated	Team
CR2404	Test Routine Change (1) - 13/03	In Progress		Imminent	University Wide
CR2422	Test SG 13/03	In Progress		Non Urgent	Team
CR2573	Standard Change Request V2 - En...	In Progress		Imminent	University Wide
CR3561	Standard Change Request - Upgr...	In Progress		Anticipated	Individual
CR4137	Standard Change Request - Garry...	In Progress		Imminent	University Wide
CR2569	Standard Change Request	In Progress		Anticipated	Team
CR3506	Standard Change Request - Upgr...	Cancelled		Anticipated	University Wide

CR2962: Standard Change Request - patch chris21

Object

Display Name:

CR2962: Standard Change Request - patch chris21

Work Item

ID:

CR2962

Title:

Standard Change Request - patch chris21

Description:

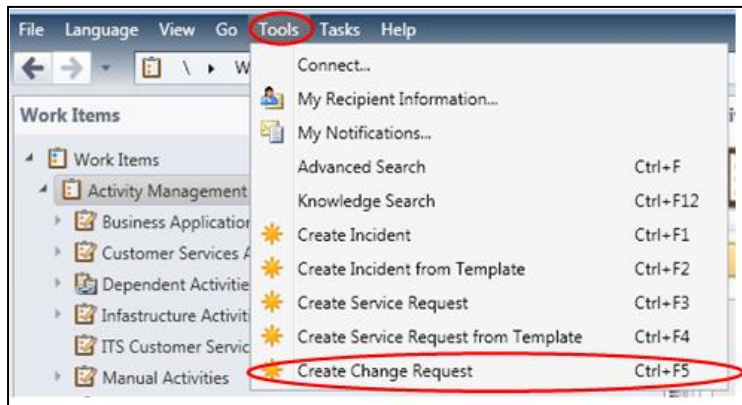
Alternate contact method:

A summary of the currently selected ticket is displayed in the preview bar below the lists of tickets.

Double clicking on a ticket will open that ticket.

Creating a New Change Request Ticket (Ctrl+F5)

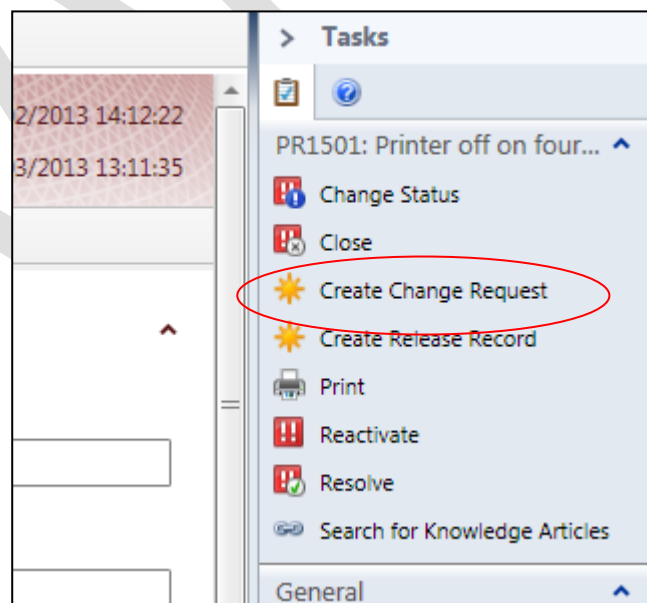
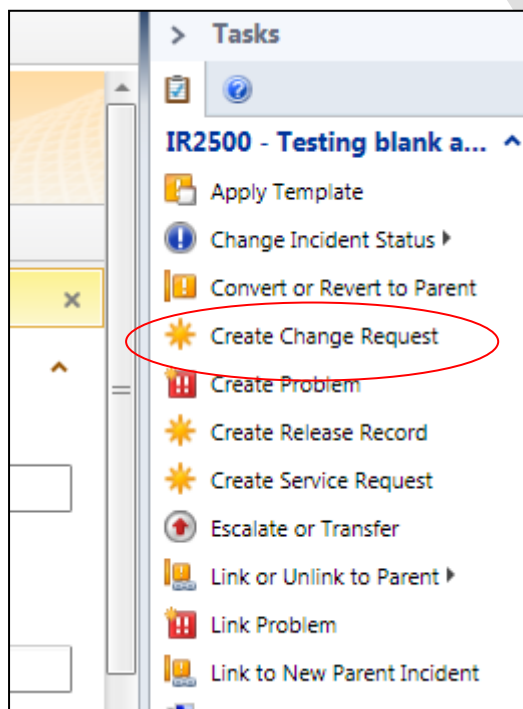
You can create a Change Request ticket in various ways. Press **Ctrl+F5** for the shortcut, select **Create Change Request** from the **Tools** menu, right click from Change Management and select **Create Change Request**, or select **Create Change Request** from the Task Area.



Creating a Change Request Ticket from a Problem or Incident ticket

If you are raising a change request ticket to resolve a problem or an incident you must raise the change request from the Problem or Incident ticket. This will ensure they incident or problems are linked.

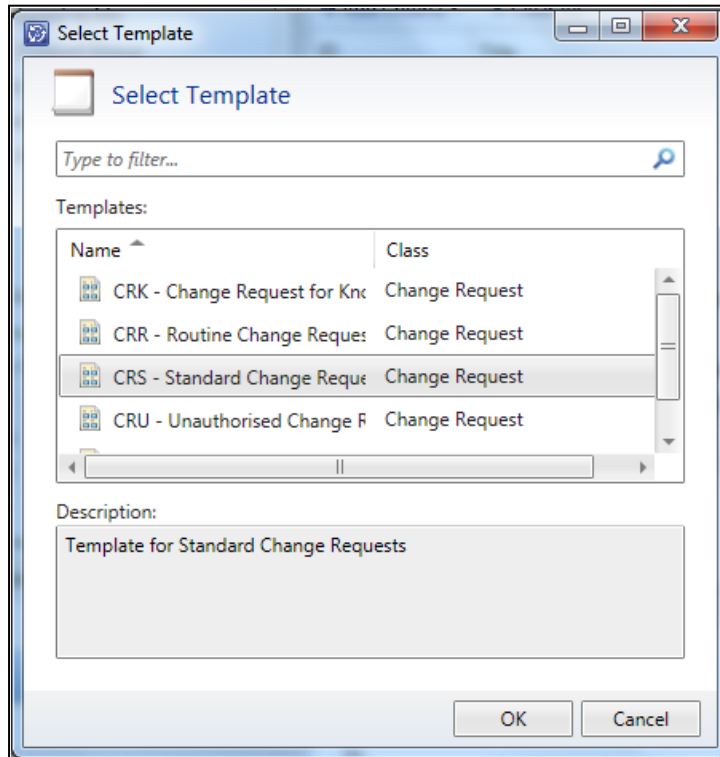
Select the Create Change Request from the taskbar of the Problem or Incident ticket.



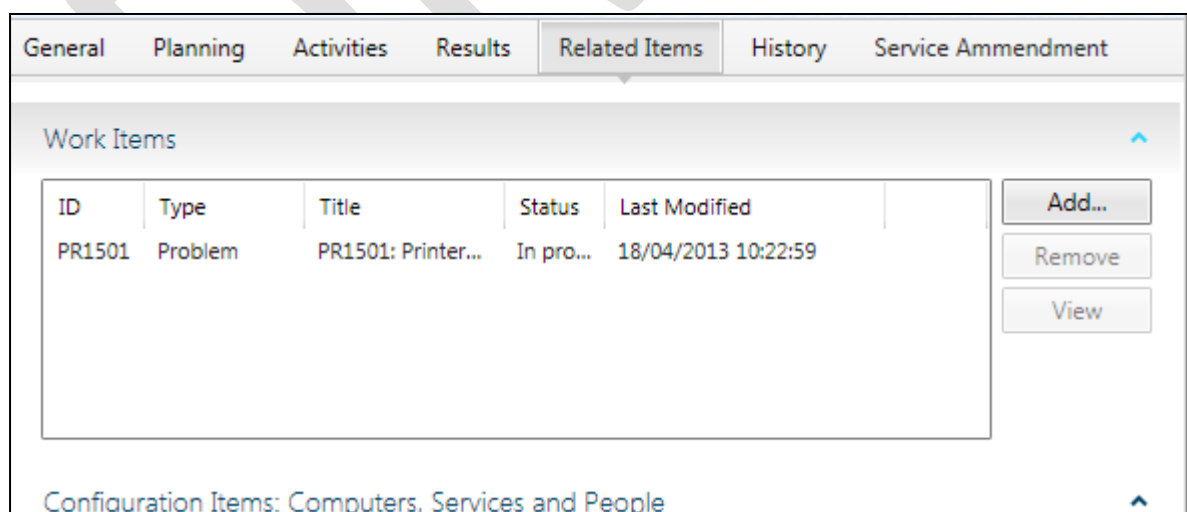
A template box will appear, pick the template you require.

Routine changes will start **CRR - Routine Change**

Use **CRS - Standard Change Request** for a standard change.



The Related Items Tab in the Change Request Ticket will show what problem or Incident tickets are linked to that ticket.



Change Request Ticket Information Capture Fields

A table explaining the ticket information capture fields is listed below. These fields can be found in the **General** Tab of a Change Request ticket. After you have captured the information you can **save** the information by clicking **OK** or **Apply** at the bottom of the screen. Clicking **OK** will save then close the ticket whilst **Apply** will save the information and keep the ticket open. Clicking **Cancel** will not save any of the information you have captured or changed.

General

Planning

Activities

Results

Related Items

History

Service Amendment

Change Request Information

Title:

Standard Change Request - Upgrade PC from Windows 3.1 to Windows Me

Description:

Update PC to Windows Me so I can use MS Word 2

Reason:

To do my job properly

Created By:

smtrain01 (smtrain01)

Alternate contact method:

Area:

Workplace Services\Desktop Service

Assigned To:

smtrain01 (smtra)

Location:

CCTP1 - Tech Park Unit 1

Support Group:

ITSBA - ITS Business Ap

Urgency:

Anticipated

Impact:

Individual

Risk:

Low

Take Ownership


Config Items To Change

ID	Type	Name	Status	Last Modif	Add
----	------	------	--------	------------	-----

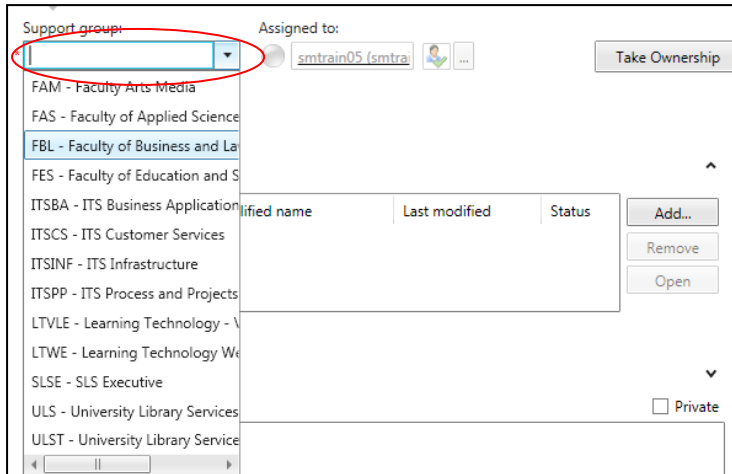
OK

Cancel

Apply

Information	Field	Description
General	Title	The title of the Change Request must be in this field
	Description	This field is a description of the Change Request. Please capture as much information as you can, as this will assist the approvers of the request.
	Reason	This field is a reason of the Change Request. Please capture as much information as you can, as this will assist the approvers of the request.
	Created By	This is the person who created the request
	Alternative contact method	Use this field to give an alternative contact method for the creator.
Service Area Assignment	Area	Pick the correct Service Area for the Change Request from the drop down list.
	Assigned To	<p>This field will show the name of the ticket owner. If you are taking Ownership of the ticket press the Take Ownership button.</p> 
	Location	Click the Location of the Change Request from the drop down list.
	Support Group	Set the resolver group to the support group you belong to .If the ticket cannot be resolved by yourself set the appropriate Support Group into this field. Please contact the Support Group before you pass the ticket to the support group.
Priority	Urgency	Pick the correct urgency from the drop down list
	Impact	Pick the correct Impact from the drop down list.
	Risk	Pick the correct risk from the drop down list. Correct risk can be gained from the Change assessment board.

Transfer the ticket to another support group



The screenshot shows a support ticket interface. The 'Support group:' dropdown menu is open, displaying a list of support groups including FAM - Faculty Arts Media, FAS - Faculty of Applied Science, FBL - Faculty of Business and La, FES - Faculty of Education and S, ITSBA - ITS Business Application, ITSCS - ITS Customer Services, ITSINF - ITS Infrastructure, ITSPP - ITS Process and Projects, LTVLE - Learning Technology - V, LTWE - Learning Technology We, SLSE - SLS Executive, ULS - University Library Services, and ULST - University Library Service. The 'Assigned to:' field shows 'smtrain05 (smtra)'. A 'Take Ownership' button is visible. Below the dropdown menu, there is a table with columns 'Assigned name', 'Last modified', and 'Status'. To the right of the table are buttons 'Add...', 'Remove', and 'Open'. A 'Private' checkbox is also visible.

To transfer the incident to another Support Group, select the **Support group** from the drop down list and click the **Take Ownership** button. Click **OK** or **Apply** to transfer the ticket to the other team. Click **Cancel** if you do not want to transfer the ticket to another group.

Please remember to contact the support group about the transfer in advance of running this process.

If you have chosen a Routine Change template please go to the [Authorise Stage](#).

Assessment Stage information

Click on the Planning tab of the Change Request ticket. The fields are described below. Click on OK when complete

General

Planning

Activities



Results

Related Items

History

Service Ammendment

Planning

Scheduled start date: 02 May 2013 00:00:00  Scheduled end date: 03 May 2013 00:00:00 

☐ Is Approved

Implementation Plan:

To implement the change we need to

1. Back up my documents
2. remove user profile
3. unisntall software a & software b
4. install software c & software d
5. add user profile
6. restore backed up data

Risk Assessment:

The risk is assessed to be low.

The change will have no effect on the server it will just affect the stand alone PC and interrump the user. The user has an alternative laptop they can use as an interim and data will be backed up..

Test Plan:

1. Install software on test PC,
2. User to test if the software works

Back out Plan:

1. re-install software a & software b on PC

OK

Cancel

Apply

Planning field	Description
Scheduled start date/ Scheduled end date	Put the dates that you are going to do the change request
Implementation Plan	A description of the implementation Plan is typed into this field
Risk Assessment	A description of the implementation Plan is typed into this field
Test Plan	A description of the implementation Plan is typed into this field
Back out Plan	A description of the implementation Plan is typed into this field

Assessment Stage (Change Assessment Review)

If the change requires a service amendment, click on the **Service Amendment** tab.

Tick on the **Is Service Amendment** tick box. Click **OK**.

General Planning Activities Results Related Items History **Service Amendment**

☒ Is Service Amendment

☐ Service Amendment Complete

When the SAFE review is complete, click on the **Service Amendment** tab.

Tick on the **Service Amendment Complete** tick box.

General Planning Activities Results Related Items History **Service Amendment**

☒ Is Service Amendment

☒ Service Amendment Complete

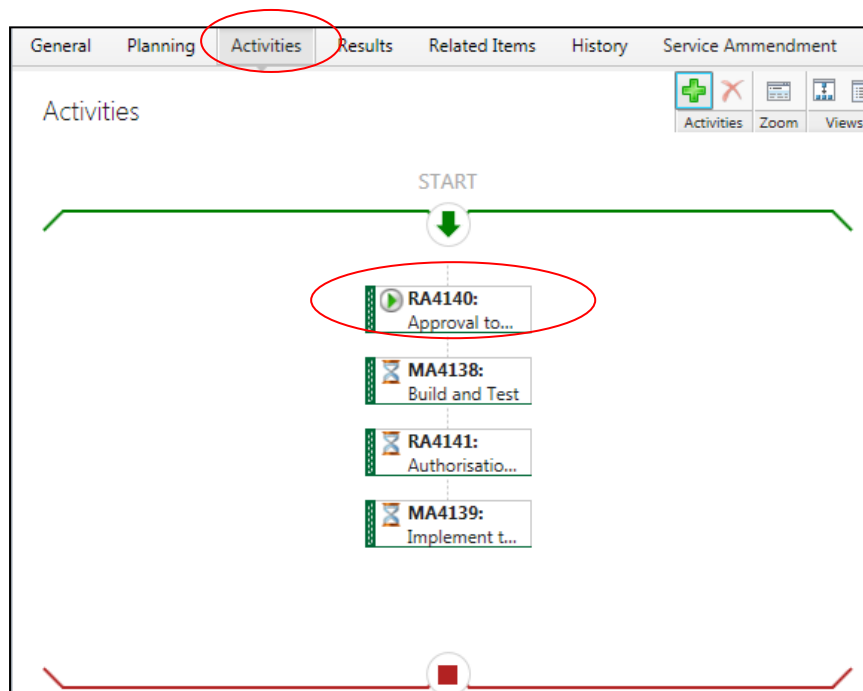
Attached Files

File Name	Attached By	Size (KB)	Attached D...
SAFE Document...	smtrain01	9.64	03/05/2013...

Upload the Change Assessment review by clicking **Add** button in the **Attached Files** section of the **Related Items** tab. Click **OK** once uploaded.

Approve Stage

Click on the **Activities** tab. Double click the **Approval to Proceed** activity.



A Review Activity request form will open.

RA4140 Activity type: Review Activity Created on: 01/05/2013 14:16
In Progress Parent Work Item: [CR4137: Standard...](#)

General History

Review Activity

Title:
Approval to Proceed Garry Upgrade to UPK version 12

Description:
This is to proceed the change request CR4137

Stage:
 ☐ Line Manager Should Review

Approval Condition:
Unanimous

Approval Threshold (%):
100

Reviewers:

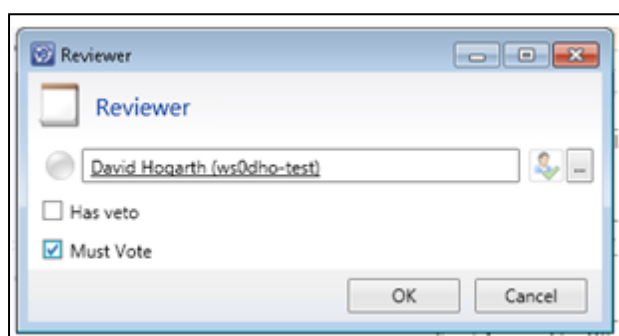
Reviewer	Has Veto	Must Vote	Voted By	Decision	Deci
smtrain01	False	False		Not Yet...	

Add Edit Delete

OK Cancel Apply

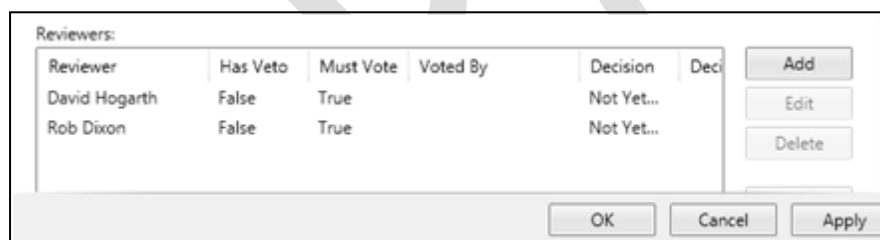
A table explaining the request activity form fields is listed below.

Field	Description
Title	The title of the Approval request goes in this field. Please expand on the text of this field so it incorporates the Change Request title. This will ensure that the approver knows what they are approving.
Description	This field is a description of the Approval Request. Please capture as much information as you can, as this will assist the approvers of the request. Include the Change Request number.
Reviewers	This is the list of the people who are the Approvers



Click on the **Add** button to add reviewers.

Add the required approver. Use the check names & search directory icons to the right of the field to help with the search. The Approver should be the change advisor for the Service area of the ticket.



The name(s) you have chosen will now be in the list. Use Edit & Delete to amend the list.

The Decision field will display if the Approval has been approved, rejected or not yet decided. Click **OK** to close the Review Activity and **OK** to close the Change ticket. If you do not close the Change Ticket the review activity will not send.

An approval email and a Review Activity will now be sent to Approvers. How to Approve the Review Activity is described in [Review Activities](#).

You cannot move to the Build & Test stage until the approval stage is complete.

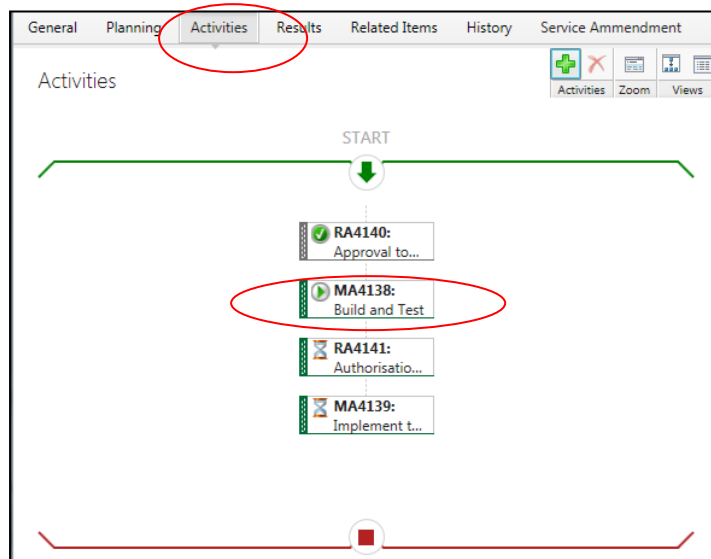
Build & Test Stage

Click on the **Activities** tab.

If there is a cross on the **Approval to Proceed** the approval was rejected and the change will have to be closed. See [Review Stage](#).

If there is a tick on the **Approval to Proceed** stage, the approval stage is complete and you can proceed to the Build & test stage.

Double click the **Build and Test** activity.



A Manual Activity form will open

The screenshot shows the 'Manual Activity' form for 'MA4138'. The form has a 'General' tab and a 'History' tab. The 'General' tab is active. The form contains the following fields: 'Title' (Build and Test - Garry Upgrade to UPK version 12), 'Description' (Build and test the change), 'Location' (dropdown), 'Activity Implementer' (smtrain01 (smtrain01)), 'Service Area' (Professional Services), 'Support Group' (ITSCS - ITS Customer Services), 'Priority' (dropdown), and 'Stage' (dropdown). The 'Take Ownership' button is highlighted with a red circle. The 'OK' button is also highlighted with a red circle. The 'Cancel' and 'Apply' buttons are also visible.

A table explaining the manual activity form fields is listed below.

Field	Description
Title	The title of the Build & Test stage goes in this field. Please expand on the text of this field so it incorporates the Change Request title. This will ensure that the Builder knows what the activity is for.
Description	This field is a description of the Build Request. Please capture as much information as you can, as this will assist the builder of the request include the Change Request number.
Location	Click the Location of the Activity from the drop down list if appropriate
Service Area	Pick the correct Service Area for the activity from the drop down list.
Support group	Set the resolver group to the support group you belong to .If the ticket cannot be resolved by yourself set the appropriate Support Group into this field. Please contact the Support Group before you pass the ticket to the support group.
Activity Implementer	<div> This field will show the name of the ticket owner. If you are taking Ownership of the ticket press the Take Ownership button. <div>Take Ownership</div> </div>

Click **OK** to close the Manual Activity and **OK** to close the Change ticket.

How to complete the manual Activity is described in [Manual Activities](#).

You cannot move to the Authorisation stage until the Build & Test stage is complete.

Remember to update information in the Planning section if there have been changes to the test, implementation and back out plan.

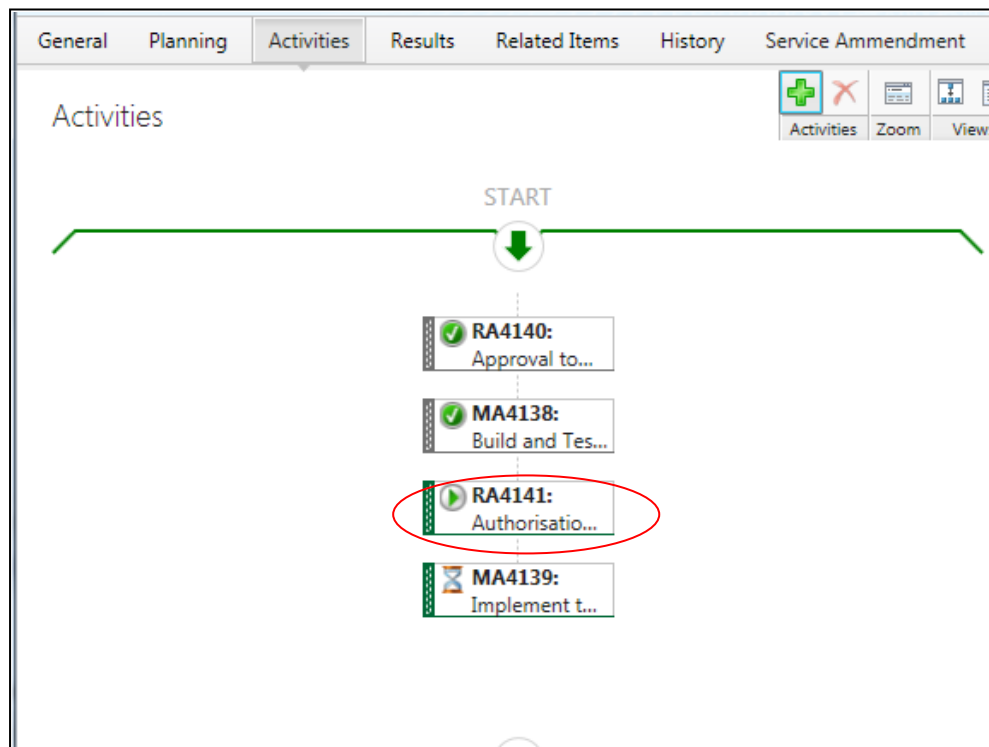
Authorise Stage

Click on the **Activities** tab.

If there is a cross on the **Build & Test**, the build & test had failed rejected and the change will have to be closed. See [Review Stage](#).

If there is a tick on the **Build & Test stage**, the build & test is complete and you can proceed to the authorise stage.

Double click the **Authorisation to Implement** activity.



An activity request form will need to be completed.

A table explaining the request form fields is listed below.

Field	Description
Title	The title of the Authorisation request goes in this field. Please expand on the text of this field so it incorporates the Change Request title. This will ensure that the authoriser knows what they are authorising.
Description	This field is a description of the Authorisation Request. Please capture as much information as you can, as this will assist the authoriser of the request. Include the Change Request number. It is important that this provides full detail as if rejected the ticket must be closed and the process would start again.
Reviewers	This is the list of the people who are the Authorisers for the change request.

RA4141 Activity type: Review Activity Created on: 01/05/2013 14:16
In Progress Parent Work Item: [CR4137: Standard...](#)

General History

Review Activity

Title:
Authorisation to Implement - Install UPK on Garry's PC

Description:
Authorisation is required to implement the change following buiding and testing.

Stage:
Release ☒ Line Manager Should Review

Approval Condition: Unanimous Approval Threshold (%): 100

Reviewers:

Reviewer	Has Veto	Must Vote	Voted By	Decision	Deci
smtrain01	False	False		Not Yet...	

Add Edit Delete

OK Cancel Apply

Reviewer

Reviewer

David Hogarth (ws0dho-test)

☐ Has veto ☒ Must Vote

OK Cancel

Click on the **Add** button to add reviewers.

Add the **Change Manager** as the reviewer. Use the check names & search directory icons to the right of the field to help with the search



Reviewers:

Reviewer	Has Veto	Must Vote	Voted By	Decision	Deci
David Hogarth	False	True		Not Yet...	
Rob Dixon	False	True		Not Yet...	

Add Edit Delete

OK Cancel Apply

The name(s) you have chosen will now be in the list. Use Edit & Delete to amend the list.

The Decision field will display if the Authorisation has approved, rejected or not yet decided. Click **OK** to close the Review Activity and **OK** to close the Change ticket.

An approval email and a Review Activity will now be sent to Approvers. How to Approve the Review Activity is described in [Review Activities](#).

You cannot move to the Implement Stage until the approval stage is complete.

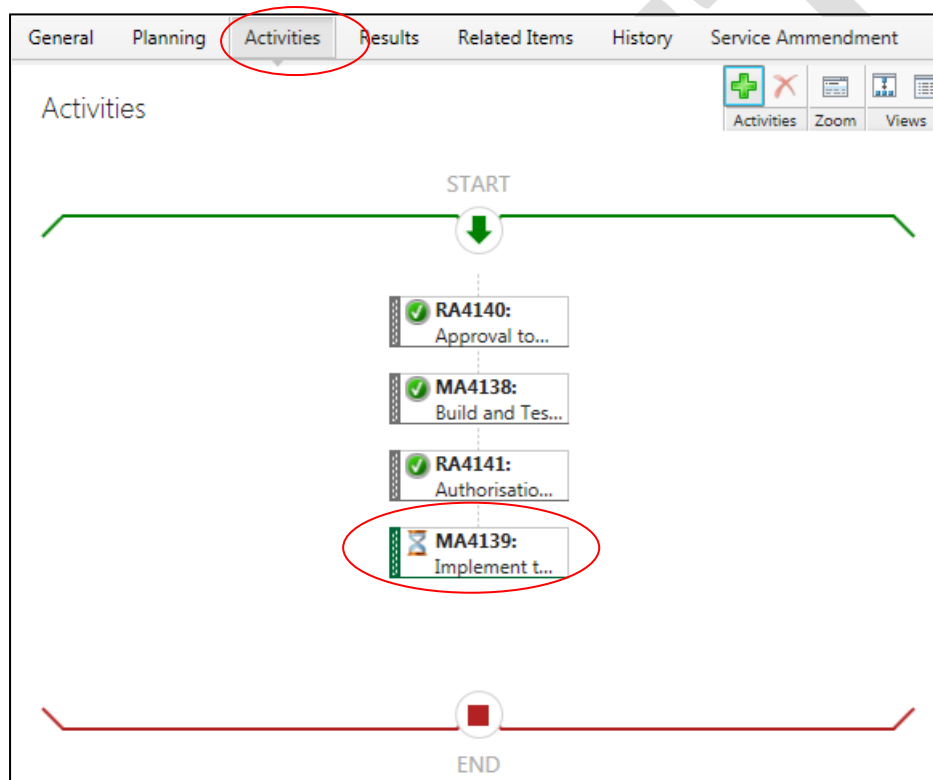
Implement Stage

Click on the **Activities** tab.

If there is a cross on the **Authorisation to Implement** the authorisation was rejected and the change will have to be closed. See [Review Stage](#).

If there is a cross on the **Authorisation to Implement** the authorisation is complete and you can proceed to the Implement stage.

Double click the **Implement the change** activity



A Manual Activity form will open

MA4139: Implement the change - Garry Upgrade to UPK version 12

Manual Activity Form Extensions

MA4139 Activity type: Manual Activity Created on: 01/05/2013 14:16

Pending Parent Work Item: CR4137: Standard...

General History

Manual Activity

Title: Implement the change - Garry Upgrade to UPK version 12

Description: Implement the change

Location:

Activity Implementer: smtrain01 (smtrain01) Take Ownership

Service Area: Business Applications

Support Group: ITSCS - ITS Customer Services

Priority: Stage:

OK Cancel Apply

A table explaining the manual activity form fields is listed below.

Field	Description
Title	The title of the Implement Stage goes in this field. Please expand on the text of this field so it incorporates the Change Request title. This will ensure that the Implementer knows what the activity is for.
Description	This field is a description of the Implementation Request. Please capture as much information as you can, as this will assist the Implementer of the request include the Change Request number.
Location	Click the Location of the Activity from the drop down list if appropriate
Service Area	Pick the correct Service Area for the activity from the drop down list.
Support group	Set the resolver group to the support group you belong to .If the ticket cannot be resolved by yourself set the appropriate Support Group into this field. Please contact the Support Group before you pass the ticket to the support group.

**Activity
Implementer**

This field will show the name of the ticket owner. If you are taking Ownership of the ticket press the **Take Ownership** button.

Take Ownership

Click **OK** to close the Manual Activity and **OK** to close the Change ticket.

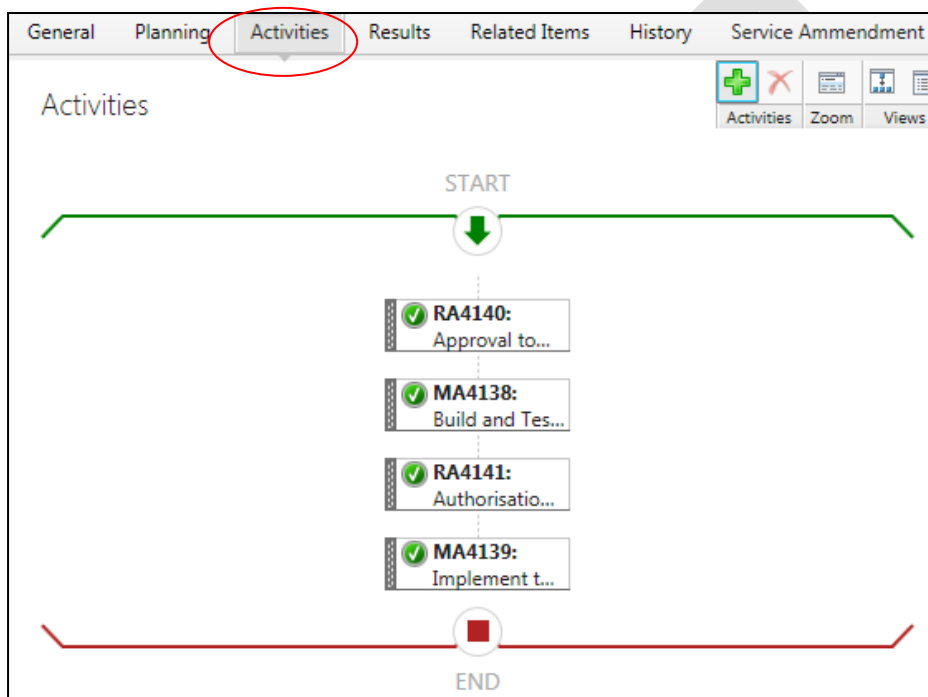
How to complete the manual Activity is described in [Manual Activities](#).

Review Stage

Click on the **Activities** tab.

If there is a cross on the **Implement..** the implementation failed .

If there is a tick on the **Implement..** the implementation passed.

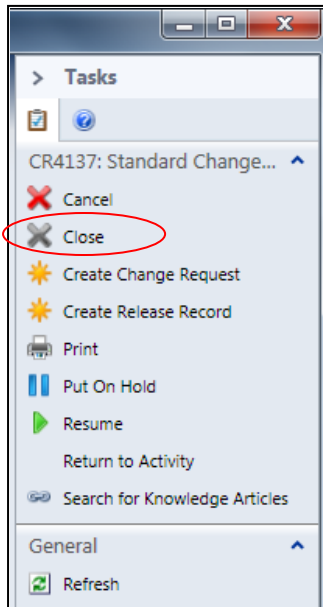


To review the change ticket click on the Results Tab. Pick the relevant Implementation results from the drop down list and complete the Post Implementation Review. There is a table below describing the meaning of the Implementation Results .

The screenshot shows a software window with several tabs: General, Planning, Activities, Results (highlighted with a red circle), Related Items, History, and Service Ammendment. The 'Results' tab is active, displaying a section titled 'Results'. Under this, there is a label 'Implementation Results:' followed by a dropdown menu currently showing 'Successfully Implemented'. Below that is a label 'Post Implementation Review:' followed by a large text input area. The text area contains the following text: 'Installed as implemetation plan. There was delay in the testing becuae we...'. At the bottom of the window, there are three buttons: 'OK', 'Cancel', and 'Apply'.

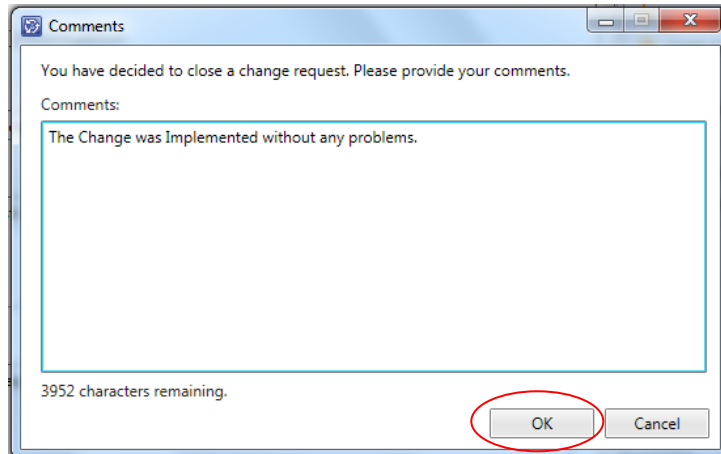
Implementation Results	Description
Successfully Implemented	You implemented the change request successfully.
Implemented with Issues	You implemented the change request but there were problems. These should be stated in the Post Implementation review.
Partially Implemented	You only partially implemented the change request. The reasons why should be stated in the Post Implementation review.
Failed	The Change request failed at the Build & Test or Implementation stage. The reasons why should be stated in the Post Implementation review
Rejected	The Change Request failed at the Approval Stage.
Cancelled	You have cancelled the request for a reason.
Unauthorized	The Change Request failed at the Authorisation stage.

Closing the Change Request



To close the change ticket click on the **Close** icon from the Task Bar.

Complete the Comment box and click **OK**.



Change Request History

To view the history of the change request, click on the **History** tab.

You will see a full list of the history of the ticket, in summary mode stating the date, time and the users. You can expand / collapse each status by clicking on the arrow to the left.

The screenshot shows a software window titled "CR4137" with a status of "Completed". The "Created date" is "01/05/2013 14:16". The "Template ID" field is empty. The window has several tabs: "General", "Planning", "Activities", "Results", "Related Items", "History" (which is selected), and "Service Amendment".

Under the "History" tab, there is a list of events:

- ▼ 01/05/2013 14:19:00 ADTE\smtrain01
- ▼ 01/05/2013 14:19:28
- ▼ 01/05/2013 14:19:29
- ▼ 01/05/2013 14:19:29
- ^ 01/05/2013 14:19:31 ADTE\svc_SCSMWorkflow

Below the list, there is a section titled "Property changes:" which contains a table:

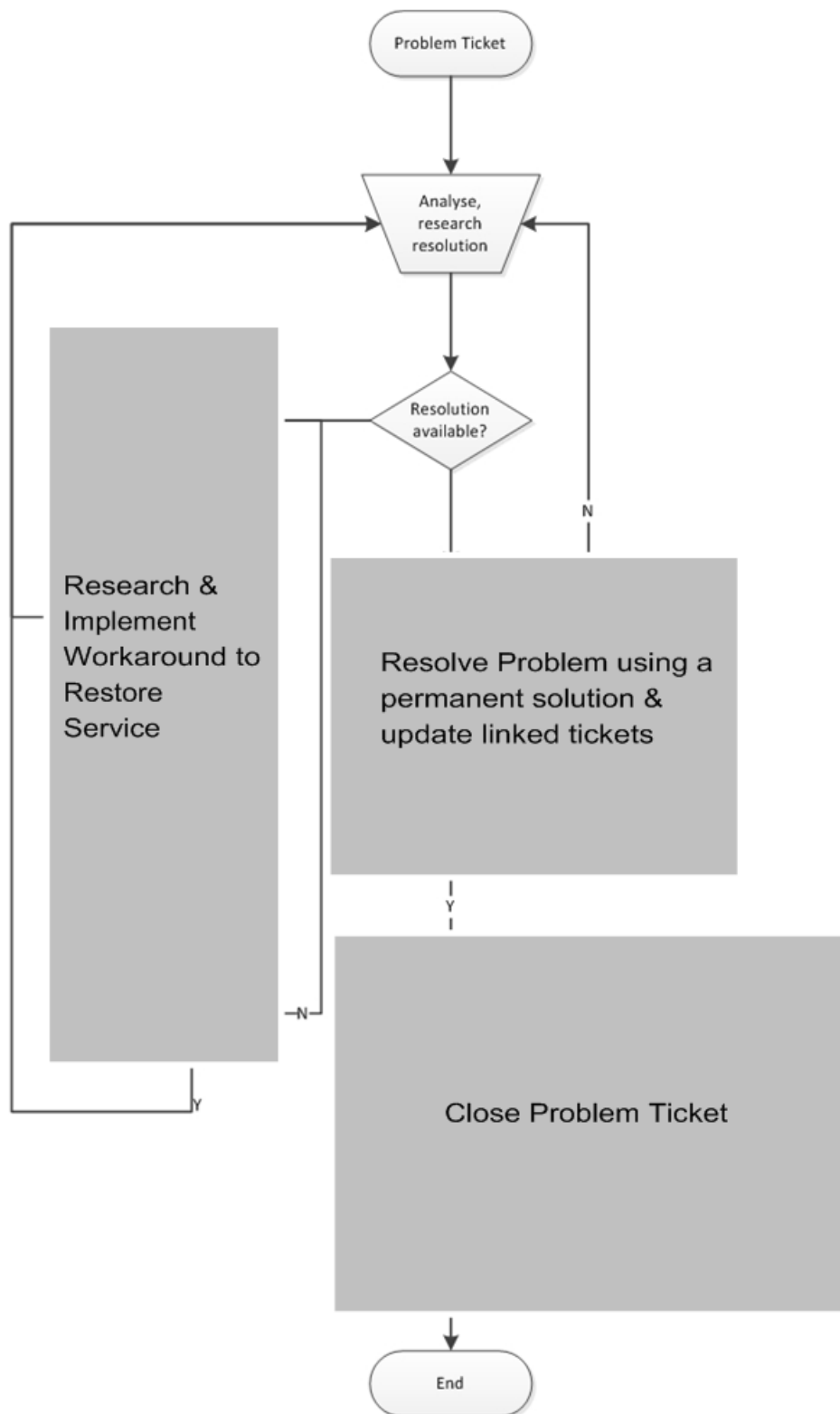
Property	Old Value	New Value
Actual start date		01/05/2013 14:19:32
Status	New	In Progress

Below the table, there is another list of events:

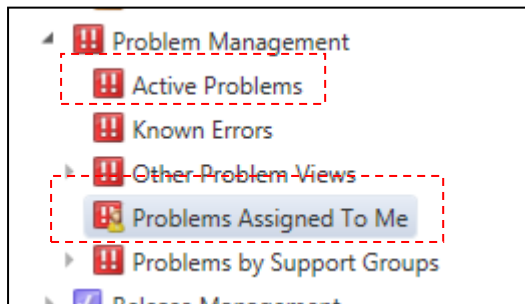
- ▼ 01/05/2013 14:19:31 ADTE\svc_SCSMWorkflow
- ▼ 01/05/2013 14:19:31 ADTE\svc_SCSMWorkflow
- ▼ 01/05/2013 14:19:32 ADTE\svc_SCSMWorkflow
- ▼ 01/05/2013 14:19:43 ADTE\svc_SCSMWorkflow
- ▼ 03/05/2013 14:20:33 ADTE\smtrain01
- ▼ 03/05/2013 14:49:43 ADTE\smtrain01

At the bottom of the window, there are three buttons: "OK", "Cancel", and "Apply".

5. Problem Tickets



Viewing and Opening Problem Tickets.



Expand the **Problem Management** area from the Work Items and select the area you wish to view. Clicking on an area will display the lists for your selection. For example clicking on **Active problems** will show all active problems. Clicking on **Known Errors** will show problems with the known error status. Clicking on **Problems Assigned To Me** show all problems that are assigned to yourself.

A screenshot of the 'Problems Assigned To Me' interface. It shows a table of problem tickets with columns for ID, Title, Priority, Known Error, and Requires Review. The ticket with ID PR3778 is selected and highlighted. Below the table, there is a preview bar for the selected ticket, showing details like Display Name, Work Item, ID, Title, Description, and Alternate contact method. The preview bar is also highlighted with a red dashed box.

ID	Title	Priority	Known Error	Requires Review
PR1501	Printer off on fourth floor	3	No	No
PR3778	Mobile phone batteries going flat	4	No	No
PR2378	Testing problems (5) 13/03	5	No	No
PR2376	Testing Problems (4) 13/03	2	No	No
PR3979	LW - link prob 4	1	No	No
PR4182	For Linda I'll send you an activity	3	No	No
PR3767	lw - test problem - Printer situati...	2	No	No
PR3977	LW - link prob 3	1	No	No

PR3778: Mobile phone batteries going flat

Object

Display Name: PR3778: Mobile phone batteries going flat

Work Item

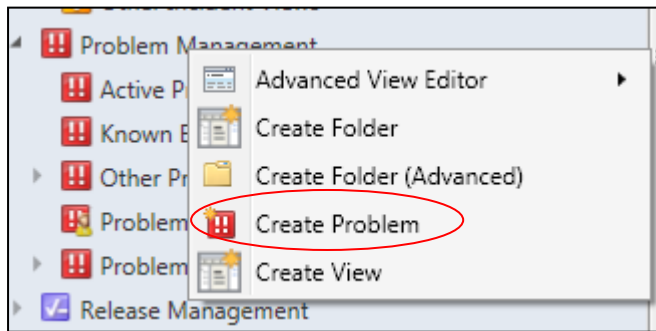
ID: PR3778 Title: Mobile phone batteries going flat

Description: Alternate contact method:

A summary of the currently selected ticket is displayed in the preview bar below the lists of tickets.

Double clicking on a ticket will open that ticket.

Creating a Problems Ticket

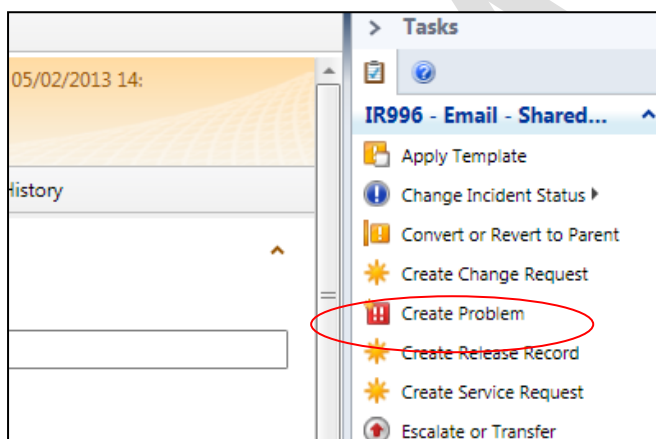


You can create a problem ticket in various ways. Right click from Problem Management and select **Create Problem**, or select **Create Problem** from the Task Area.

Creating a Problem Ticket from an Incident ticket

If you are raising a problem ticket to resolve an incident you must raise the problem from the Incident ticket. This will ensure that the incident and problem is linked.

Select the Create Problem from the taskbar of the Incident ticket.



The Related Items Tab in the Problem Ticket will show the Incident tickets are linked to that ticket.

Problem Ticket Information Capture Fields

A table explaining the ticket information capture fields is listed below. These fields can be found in the **General** Tab of a Problem ticket. After you have captured the information you can **save** the information by clicking **OK** or **Apply** at the bottom of the screen. Clicking **OK** will save then close the ticket whilst **Apply** will save the information and keep the ticket open. Clicking **Cancel** will not save any of the information you have captured or changed.

PR4401 Created 10/05/2013 12:44:24
New Resolved

General Related Items Resolution History

Problem Information

Title:
Email - Shared Mail Box Problems

Description:
Lynn username (ua0tte) has been given access to the below Shared mail box. Lynn can access the account from webmail but cannot access it from Outlook 2007
Shared mail box : Segi UG Business (bs0sug)

Location:
[Dropdown]

Support Group: ITSCS - ITS Customer Services Source: From an Incident

Assigned to: smtrain01 (smtrain01) [Avatar] [Take Ownership]

Service Area: Access Control Impact: Individual Urgency: Alternative Service Priority: 5

Affected Items

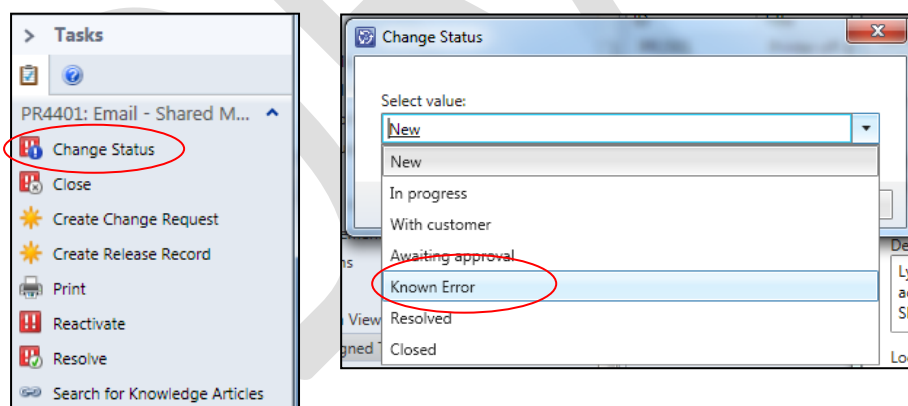
OK Cancel Apply

Information	Field	Description
General Information	Title	The title of the Problem must be in this field. If the problem ticket was created from a incident the incident title will automatically be copied into this title.
	Description	This field is a description of the Problem Ticket. Please capture as much information as you can, as this will assist the resolver of the problem.

	Location	Select the Location of the problem from the drop down list.
Assignment	Support Group	Set the resolver group to the support group you belong to .If the ticket cannot be resolved by yourself set the appropriate Support Group into this field. Please contact the Support Group before you pass the ticket to the support group.
	Assigned To	This field will show the name of the ticket owner. If you are taking Ownership of the ticket press the Take Ownership button. <div>Take Ownership</div>
Source	Source	Pick the correct Source of the ticket from the drop down list.
Service Area	Service Area	Pick the correct Service Area for the problem from the drop down list.
Priority	Urgency	Pick the correct Urgency from the drop down list
	Impact	Pick the correct Impact from the drop down list.

Changing To Known Error Status & Adding Workaround

To change the status of the problem to Known Error, click on the Change Status button from the Taskbar **Results** tab. Select **Known Error** from the drop down list and click **OK** from the Change Status box.



You then need to add the Workaround information. Click on the **Resolution** tab and enter the information in the **Workarounds** text box. If you have raised the problem from an incident ticket this information can be copied to the **Action Log** of the Incident ticket. This will allow the affected user of the Incident ticket to see the workaround which they could implement.

To save the status click on **Apply** or **OK** at the bottom of the ticket.

General Related Items **Resolution** History

Error and problem review

Error Description

Workarounds

Install Microsoft office 2010 and change option A to Re-direct for exchange server

Review Notes ☐ Requires Major Problem Review

Resolution Details

☐ Auto-resolve all incidents associated with this problem

Resolving the ticket

Tasks

PR4401: Email - Shared M...

Change Status

Close

Create Change Request

Create Release Record

Print

Reactivate

Resolve

Search for Knowledge Articles

To resolve the problem ticket, click on the Resolve button from the Taskbar.

Click on the **Resolution** tab and enter the Resolution Details at the bottom of the form. Select the **Resolution Category** from the drop down list. There is a table below describing the meaning of the Resolution Categories. Type a meaningful **Resolution Description** in the field as the resolution may be needed for future problems or incidents.

To save the status click on **Apply** or **OK** at the bottom of the ticket.

General Related Items **Resolution** History

Resolution Details

☐ Auto-resolve all incidents associated with this problem

Resolution Category:

Service Restored

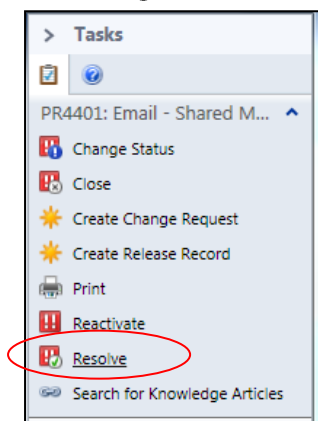
Resolution Description:

The proble was resolved by changing setting 1234 on the exchange 2013 server. This will automattically fix the affected users computers without more intervention.

OK Cancel Apply

Resolution Category	Description
Service Restored	The service request was successfully completed.
Successfully Implemented	You implemented the request successfully but are awaiting confirmation from the affected user.
Implemented with Issues	You implemented the request but there were problems.
Partially Implemented	You have partially implemented the request.
Failed	You implanted the request but it failed.
Rejected	You have rejected the request for a reason.
Cancelled	You have cancelled the request for a reason.
Unauthorized	The affected user has no authorization for the request.

Resolving the Problem and linked Incident tickets



To resolve the problem ticket and linked incident tickets, click on the **Resolve** button from the Taskbar.

Click on the **Resolution** tab and enter the Resolution Details at the bottom of the form. Tick the **Auto-resolve all incidents...** tick box. This will resolve all the linked incidents. Select the **Resolution Category** from the drop down list. See the table above for a description of the Resolution Categories. Type a meaningful **Resolution Description** in the field as the resolution may be needed for future problems or incidents. This information will also be copied to the **Action Log** of the linked incident tickets.

To save the status click on **Apply** or **OK** at the bottom of the ticket.

 A screenshot of a software interface showing the 'Resolution' tab. The 'Resolution Details' section is visible. The 'Auto-resolve all incidents associated with this problem' checkbox is checked and circled in red. The 'Resolution Category' dropdown menu is open, showing 'Service Restored' selected, and is also circled in red. The 'Resolution Description' text area contains the text: 'The problem was resolved by changing setting 1234 on the exchange 2013 server. This will automatically fix the affected users computers without more intervention.' The text area is outlined with a dashed red border. At the bottom of the form, there are 'OK', 'Cancel', and 'Apply' buttons.

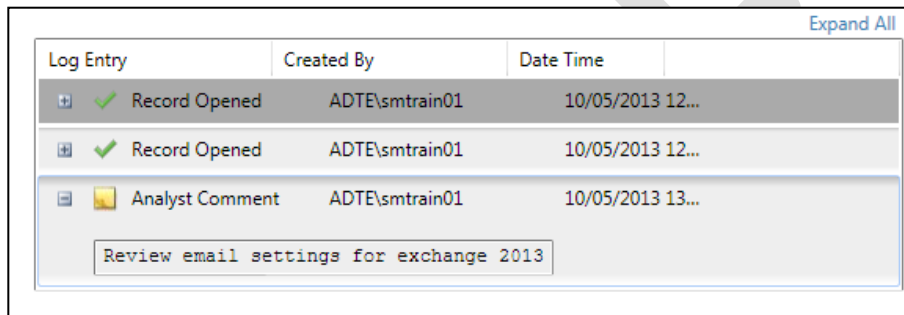
Adding Actions

The Action Log is an area where you can add actions or information about the ticket. It is found at the bottom of the **General** tab of the Problem ticket. It will also record any transfers and assignment of the ticket. If you wish to add information or actions, click in the **Comment** field of the **Action Log**, and type the required information. You have 4000 characters to use per Comment. Click on the **Add** button to add the comment.



The screenshot shows the 'Action Log' section with a 'Comment' text area containing the text 'Review email settings for exchange 2013'. Below the text area, it indicates '3961 characters remaining'. An 'Add' button is located at the bottom right of the comment field.

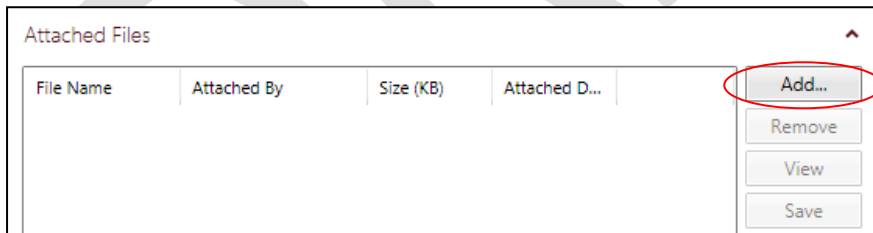
The history of the Log is displayed underneath this field. You can expand or contract the Log entry by clicking the Expand / Collapse icons to the left of the entry. There is also an **Expand All / Collapse All** icon to the top right of the entries.



The screenshot shows a table with the following columns: Log Entry, Created By, and Date Time. There is an 'Expand All' link at the top right. The table contains three entries: two 'Record Opened' and one 'Analyst Comment'. The 'Analyst Comment' entry is expanded, showing the comment text 'Review email settings for exchange 2013'.

Log Entry	Created By	Date Time
Record Opened	ADTE\smtrain01	10/05/2013 12...
Record Opened	ADTE\smtrain01	10/05/2013 12...
Analyst Comment	ADTE\smtrain01	10/05/2013 13...

Attaching Files to Problems

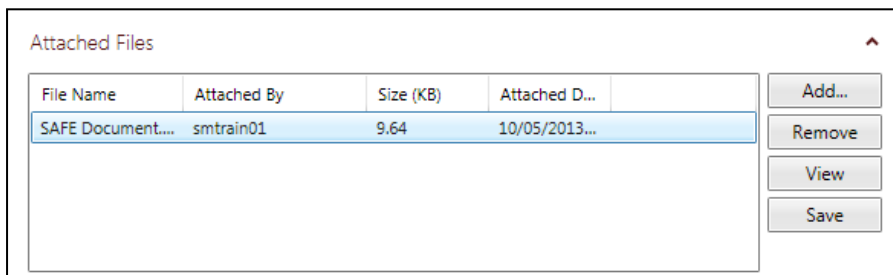


The screenshot shows the 'Attached Files' section with a table containing columns: File Name, Attached By, Size (KB), and Attached D... The 'Add...' button is circled in red. Below the table are buttons for 'Remove', 'View', and 'Save'.

To add a file attachment to the Problem, click on the **Related Items** Tab. Go to the **Attach Files** section to the bottom of

the screen and click on **Add...**

Select the files you wish to attach and click the Open button to attach the files to the ticket.



The screenshot shows the 'Attached Files' section with a table containing columns: File Name, Attached By, Size (KB), and Attached D... The file 'SAFE Document....' is attached by 'smtrain01' with a size of 9.64 KB and a date of 10/05/2013... The 'Add...' button is now disabled. Below the table are buttons for 'Remove', 'View', and 'Save'.

Problem History

To view the history of the service request, click on the **History** tab.

You will see a full list of the history of the ticket, in summary mode stating the date, time and the users. You can expand / collapse each status by clicking on the arrow to the left.

The screenshot shows a window titled "PR4401" with a red header bar. On the left is a red icon with two exclamation marks. Below the icon is the text "With customer". On the right side of the header bar, there are two entries: "Created 10/05/2013 12:44:24" and "Resolved 10/05/2013 13:17:05". Below the header bar is a tabbed interface with four tabs: "General", "Related Items", "Resolution", and "History". The "History" tab is selected. The main content area of the "History" tab shows a list of events. Each event starts with a collapse/expand arrow (downward for collapsed, upward for expanded), followed by a timestamp and a user name. The events are: 1. 10/05/2013 12:46:18 ADTE\smtrain01 (collapsed). 2. 10/05/2013 12:46:32 (collapsed). 3. 10/05/2013 12:46:32 (collapsed). 4. 10/05/2013 12:47:16 ADTE\svc_SCSMWorkflow (collapsed). 5. 10/05/2013 13:01:46 ADTE\ (expanded). Below the expanded event, there is a tooltip showing the timestamp and user: "10/05/2013 12:47:16 ADTE\svc_SCSMWorkflow". Below the list of events, there is a section titled "Property changes:" followed by a table. The table has three columns: "Property", "Old Value", and "New Value". The table contains two rows: "Workarounds" with an empty "Old Value" and "Install Microsoft office 2010 and change option A to Re-direct for exchange" as the "New Value"; and "Status" with "New" as the "Old Value" and "Known Error" as the "New Value". At the bottom of the window are three buttons: "OK", "Cancel", and "Apply".

PR4401

Created 10/05/2013 12:44:24

Resolved 10/05/2013 13:17:05

With customer

General Related Items Resolution History

▼ 10/05/2013 12:46:18 ADTE\smtrain01

▼ 10/05/2013 12:46:32

▼ 10/05/2013 12:46:32

▼ 10/05/2013 12:47:16 ADTE\svc_SCSMWorkflow

^ 10/05/2013 13:01:46 ADTE\

10/05/2013 12:47:16 ADTE\svc_SCSMWorkflow

Property changes:

Property	Old Value	New Value
Workarounds		Install Microsoft office 2010 and change option A to Re-direct for exchange
Status	New	Known Error

OK Cancel Apply

6. Activities

You can create activities from Incident, Service Request and Change Request tickets. Activities can be created to help you resolve your tickets. Change Request tickets use Activities to follow the process stages, e.g. Build & Test, and Approve Stages.

There are 2 types of activities: Manual and Review. Manual Activities are activities you have to physically complete to resolve your ticket. Review Activities are activities that require approval from a person to resolve your ticket e.g. Approval & Authorisation in the Change Request Process.

Manual Activities Capture Fields

A table explaining the ticket information capture fields is listed below. These fields can be found in the **General** Tab of a Manual Activity ticket. After you have captured the information you can **save** the information by clicking **OK** or **Apply** at the bottom of the screen. Clicking **OK** will save then close the ticket whilst **Apply** will save the information and keep the ticket open. Clicking **Cancel** will not save any of the information you have captured or changed.

MA3266: Add UserID to DG_Printers group.

Manual Activity Form Extensions

MA3266 Activity type: Manual Activity Created on: 10/04/2013 14:55

Completed Parent Work Item: [IR3243 - Test incident IL](#)

General History

Manual Activity

Title: Add UserID to DG_Printers group.

Description: Use A D U & C to add UserID to correct group.

Location: CCTP1 - Tech Park Unit 1

Activity Implementer: smtrain01 (smtrain01) Take Ownership

Service Area: Professional Services

Support Group: ITSBA - ITS Business Applications

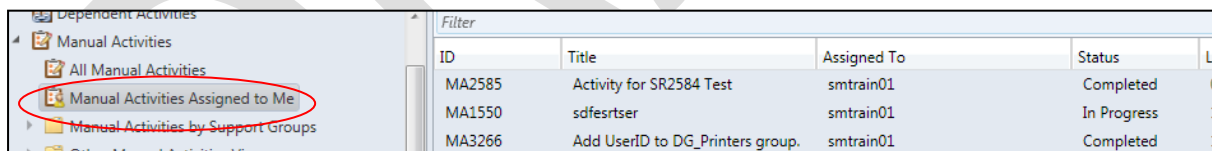
Priority: Immediate Stage:

OK Cancel Apply

Information	Field	Description
General Information	Title	The title of the Activity must be in this field
	Description	This field is a description of the Activity Ticket. Please capture as much information as you can, as this will assist the resolver of the activity.
Assignment	Support Group	Set the resolver group you belong to the Support Group .If the ticket cannot be resolved by yourself set the correct Resolver Group into this field. Please contact the Resolver Group before you pass the ticket to the resolver group.
	Activity Implementer	This field will show the name of the ticket owner. If you are taking Ownership of the ticket press the Take Ownership button. <div>Take Ownership</div>
Service Area	Service Area	Pick the correct Service Area for the activity from the drop down list.
Location & Priority	Location	Select the Location of the activity from the drop down list.
	Priority	Select the Priority of the activity from the drop down list. This should reflect the timescales as stated from the original ticket the activity is a part of.

Viewing and Opening Manual Activities Assigned to You

Expand the **Activity Management**, then **Manual Activities** from the Work Items area. Click on **Manual Activities Assigned to Me** show all manual activities that are assigned to you.



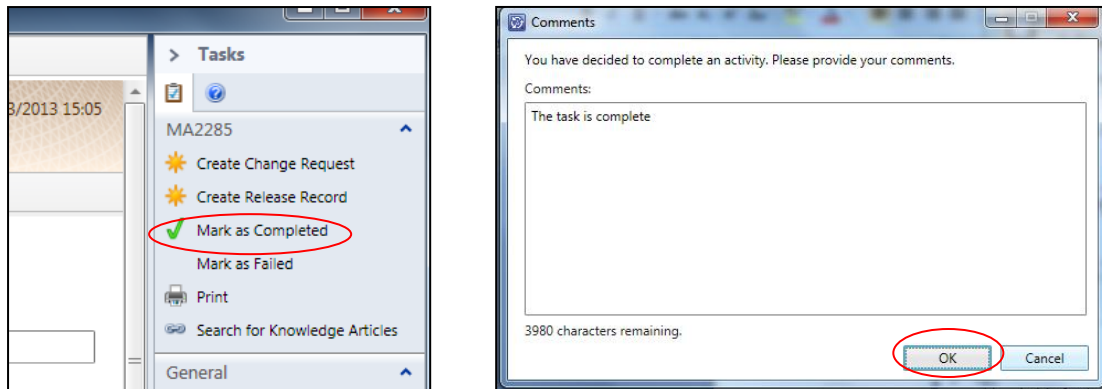
ID	Title	Assigned To	Status
MA2585	Activity for SR2584 Test	smtrain01	Completed
MA1550	sdferstser	smtrain01	In Progress
MA3266	Add UserID to DG_Printers group.	smtrain01	Completed

A summary of the currently selected ticket is displayed in the preview bar below the lists of tickets.

Double clicking on a ticket will open that ticket.

Completing a Manual Activity

To complete a manual activity, open the activity. Click **Mark as Complete** from the Task Bar, leave a comment on how you completed the activity and click OK.



Review Activities Capture Fields

A table explaining the ticket information capture fields is listed below. These fields can be found in the **General** Tab of a Review Activity ticket. After you have captured the information you can **save** the information by clicking **OK** or **Apply** at the bottom of the screen. Clicking **OK** will save then close the ticket whilst **Apply** will save the information and keep the ticket open. Clicking **Cancel** will not save any of the information you have captured or changed.

The screenshot shows a 'Review Activity' form for ticket RA4141. The form is divided into two tabs: 'General' and 'History'. The 'General' tab is active. The form contains the following fields and sections:

- Title:** Authorisation to Implement - Install UPK on Garry's PC
- Description:** Authorisation is required to implement the change following buiding and testing.
- Stage:** Release (dropdown menu)
- Approval Condition:** Unanimous (dropdown menu)
- Approval Threshold (%):** 100 (spinner control)
- Reviewers:** A table with columns: Reviewer, Has Veto, Must Vote, Voted By, Decision, Decision. The first row shows: smtrain01, False, False, smtrain01, Approved, 5/7/2013.
- Buttons:** Add, Edit, Delete, Approve, Reject, OK (highlighted with a red circle), Cancel, Apply.

Approving or Rejecting a Review Activity

There are 3 ways to approve or reject a review activity.

1. Open the activity. Click **Approve** or **Reject** from the Reviewers section of the form, leave a comment on why you have chosen to approve or reject the activity and click **OK**.

Reviewers:

Reviewer	Has Veto	Must Vote	Voted By	Decision
smtrain01	False	False		Not Yet...

Buttons: Add, Edit, Delete, **Approve**, **Reject**, Approve All, Reject All

Comments

You have decided to approve an activity. Please provide your comments.

Comments:

I approve this change request

227 characters remaining.

OK Cancel

2. Highlight the activity you wish to Approve or Reject from the list. Click **Approve** or **Reject** from the Task Bar, leave a comment on why you have chosen to approve or reject the activity and click **OK**.

Review Activities Assigned to Me 14

ID	Title	Status	Approval Cond...	Approval Thres...
RA2417	Approval to Proceed	Completed	Unanimous	100
RA2414	Approve Routine Change - Windows Updates	Completed	Unanimous	100
RA2608	Authorisation to Implement	Completed	Unanimous	100
RA2423	Approval to Proceed	In Progress	Percentage	5
RA2460	Approval to Proceed for Change CR2458 - SG Test 14/03 (1)	Completed	Percentage	5
RA2570	Approval to Proceed	In Progress	Unanimous	100
RA2418	Authorisation to Implement	Completed	Unanimous	100

Tasks:

- RA2423: Approval to Proceed**
 - Approve**
 - Create Change Request
 - Create Release Record
 - Edit
 - Reject**
 - Search for Knowledge Articles

Comments

You have decided to approve an activity. Please provide your comments.

Comments:

I approve this change request

227 characters remaining.

OK Cancel

3. Approve or reject via the Approval required email. Click on **Approve** or **Reject** link in the email then click **Send**.

SCSM Workflow Account 03/05/2013

Approval Required

SCSM Workflow Account 01/05/2013

If you are unable to agree please reject. It would be helpful if you notes to the response

Please make your choice below and send

Approve
Reject

7. Knowledge Articles

Knowledge Articles are displayed on the portal screen and can be used by the customers for self service.

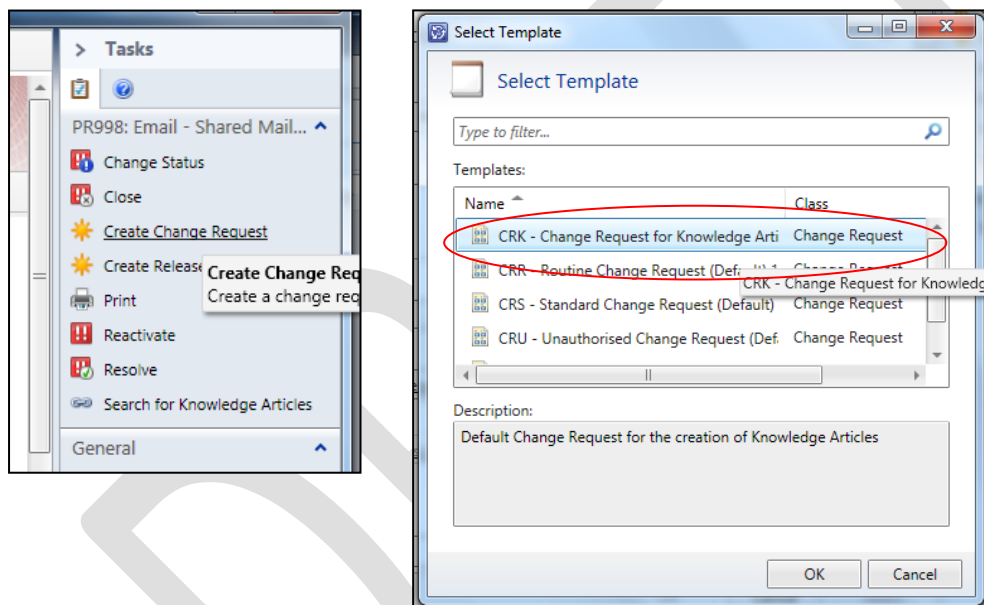
Knowledge Articles are raised from a Problem, Incident or Service Request ticket where there is sufficient and correct resolution information.

An analyst can only request that a knowledge article can be published. The articles will be published by Knowledge Managers.

Raising a Knowledge Article Request

Open the Incident, Service Request or Problem ticket you are creating the Knowledge Article request from. Select the **Create Change Request** from the taskbar of the ticket.

Select **CRK – Change Request for Knowledge Article** from the template box.



A table explaining the ticket information capture fields is listed below. These fields can be found in the **General** Tab of a Change Request ticket. After you have captured the information you can **save** the information by clicking **OK** or **Apply** at the bottom of the screen. Clicking **OK** will save then close the ticket whilst **Apply** will save the information and keep the ticket open. Clicking **Cancel** will not save any of the information you have captured or changed.

Change Request Information

Title:
CRK - Email Share Request Workaround

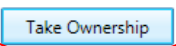
Description:
The Workaround in the problem ticket will solve all the current calendar share request problems

Reason:

Created By:
smtrain01 (smtrain01)

Alternate contact method:

Area:
Training and Support\Knowledge


Assigned To:
smtrain01 (smtrain01) 

Location:

Support Group:
NF - ITS Infrastructure

Urgency: Impact: Risk:

OK Cancel Apply

Information	Field	Description
General	Title	The title of the Knowledge Article must be in this field
	Description	This field is a description of the Knowledge Article.
	Created By	This is the person who created the request
Service Area Assignment	Area	Pick the correct Service Area for the Knowledge Article from the drop down list.
	Assigned To	This field will show the name of the ticket owner. If you are taking Ownership of the ticket press the Take Ownership button. 
	Support Group	Set the resolver group to the support group you belong to .If the ticket cannot be resolved by yourself set the appropriate Support Group into this field. Please contact the Support Group before you pass the ticket to the support group.

8. User Details

To view the user details of an affected user, double click on the name from the **Affected User** field of an Incident or Service Request.

Viewing Contact Details

The name and contact details are displayed in the General Tab of the User form. Please **do not** change any of these details as the details must be changed on Active Directory. To request a change of details the **customer** must complete the **Update My Details** form. This can be found in the **Services** section of the portal.

The screenshot shows a web form for user details. At the top, there is a header with a profile picture of a man and the name 'Garry Storer'. Below this is a tabbed interface with five tabs: 'General' (selected), 'Related Items', 'Organization', 'Notification', and 'Computers and Devices'. The 'General' tab contains several input fields. Under the 'Name' section, there are three fields: 'First Name' (containing 'Garry'), 'Initials' (empty), and 'Last Name' (containing 'Storer'). Below these are 'Display as:' (containing 'Garry Storer') and 'User name:' (containing 'ws0gst'). Further down, there are fields for 'Street Address' (empty), 'Title' (empty), 'Company' (empty), 'City' (empty), 'Department' (empty), 'State' (empty), 'Office' (empty), 'Zip' (empty), 'Business Phone' (empty), 'Locale:' (empty), and 'Country' (empty). At the bottom right of the form are three buttons: 'OK', 'Cancel', and 'Apply'.

Name		
First Name	Initials	Last Name
Garry		Storer
Display as:		User name:
Garry Storer		ws0gst

Street Address	Title
	Company
City	Department
State	Office
Zip	Business Phone
Locale:	Country

OK Cancel Apply

Viewing Previous or Other Active Tickets for the User

To view Previous or Other Active Tickets for the user click on the **Related Items** Tab.

The Tickets can be view in the Work items affecting this user section. You can sort the tickets by clicking on the headings at the top of the list, and you scroll up and down the list by the scroll bar to the right or the arrow keys on the keyboard. Click on **View** to open the currently selected ticket.

User - Garry Storer

Active Directory User Form Extensions

Garry Storer

General **Related Items** Organization Notification Computers and Devices

Work items created by this user

ID	Type	Title	Status	Last Modified
PR998	Problem	PR998: Email - S...	In pro...	05/04/2013 09:52:04
IR765	Incident	IR765 - Email Ac...	Resol...	05/04/2013 09:52:03
IR996	Incident	IR996 - Email -...	Resol...	10/05/2013 12:46:39
SR775	Service Req...	SR775 : Oracle 12	Subm...	05/04/2013 09:52:04
IR1340	Incident	IR1340 - Test E...	Resol...	05/04/2013 09:52:03

Work items affecting this user

ID	Type	Title	Status	Last Modified
IR3265	Incident	IR3265 - testt	Resol...	10/04/2013 16:03:11
IR3307	Incident	IR3307 - ekdjwk	Active	10/04/2013 16:25:26
IR3709	Incident	IR3709 - nc - tes...	Resol...	28/04/2013 02:00:49
IR3249	Incident	IR3249 - Meetin...	Active	10/04/2013 14:54:44
IR996	Incident	IR996 - Email -...	Resol...	10/05/2013 12:46:39

Work items closed by this user

ID	Type	Title	Status	Last Modified
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OK Cancel Apply

Appendix 1 - Priority Matrix

	Impact (How widely are the effects of the issue felt)			
Urgency (when will the issue affect service)	University- wide	Faculty / Service	Team / floor	Individual
Immediate response required. E.g. service is unavailable	P1 MI	P1	P2	P3
Imminent, response time critical. E.g. service is degraded	P1	P2	P3	P4
Anticipated, response time sensitive E.g. interferes with normal working practice	P2	P3	P4	P5
Non-urgent response required	P3	P4	P5	P6

Appendix 2 -Priority Information

Priority code	Urgency of response	Target resolution (within core hours)
P1 MI	P1 with immediate senior management escalation through the Major Incident process. Sustained effort using all available resources until service is restored	3 hours
P1	Immediate, effort using appropriate and available resources until service is restored	3 hours
P2	Assess the situation within an hour. Staff may be interrupted and taken away from lower priority jobs	1 business day
P3	Assess the situation within a business day and respond using standard procedures within the normal frameworks	2 business days
P4	Respond using standard procedures and operating within the normal frameworks.	5 business days
P5	Respond using standard procedures and operating within the normal frameworks as time allows.	10 business days
P6	Response agreed and scheduled with originator	10 business days+, scheduled with originator

